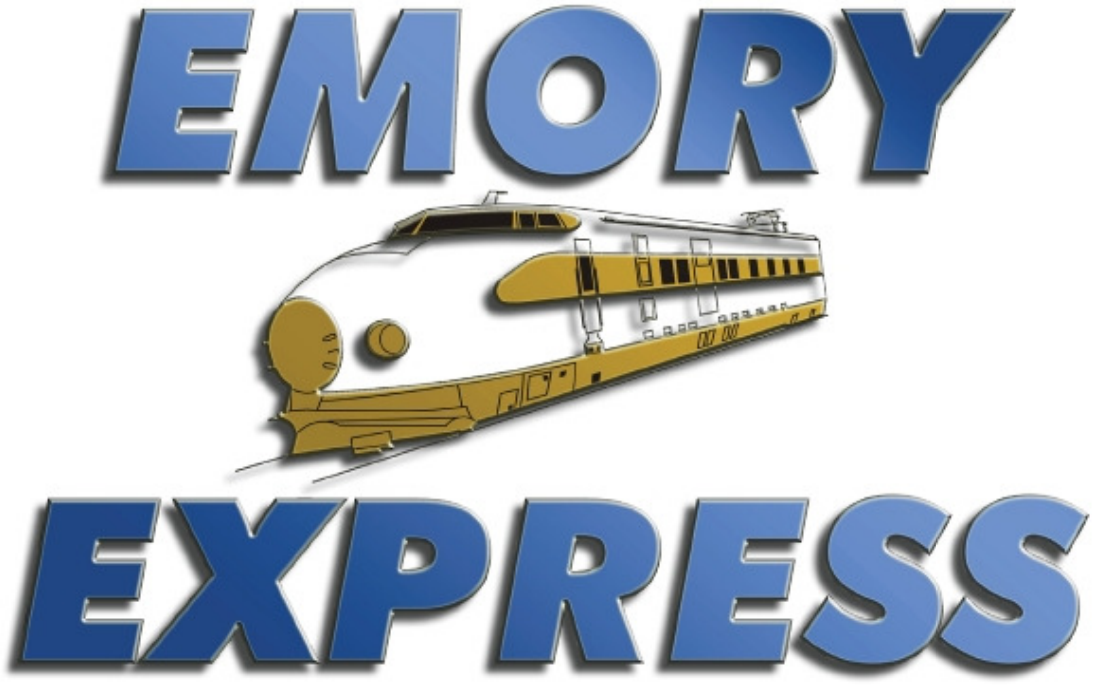


- *Transforming the Future of Buying at Emory*

# *Training Manual*

***Questions:*** ***e-market@emory.edu***

***Website:*** ***https://www.finance.emory.edu***

***Customer Care:*** ***727-5400***

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# The Emory Marketplace

The Emory Marketplace provides **1-stop shopping** with direct links to *Emory Express* as well as to internal and external suppliers.

The MarketPlace also contains purchasing tools, commodity specific information, and other resources.

## To enter the Emory MarketPlace

1. www.finance.emory.edu
2. Select the PROCURE & PAY tab
3. Select the *Buying in the Marketplace* link

SCHOOLS
LIBRARIES
RESOURCES
SEARCH
EMORY UNIVERSITY
Finance Division
PAYROLL
PROCURE & PAY
TRAVEL
GRANTS
ACCOUNTING
REPORTING
CASH & DEBT
FINANCE TRAINING
Procure & Pay
Buying in the Marketplace
Buying Green
Scientific Procurement Advisory Council
Procurement Resources
Payment Services
Contract Administration
Training for our Campus
Supplier Diversity
Policies
Procure & Pay FAQ's
Archived Articles and Memos
Glossary of Terms
About Us
For Suppliers
Emory's Marketplace - Where the Emory Campus can Purchase their Supplies and Services
Our Emory Marketplace provides you information on How to Buy and is the official launching point into Emory Express. Emory Express is where you can shop and purchase your supplies, equipment, and services from our contract suppliers through the Emory Express Punchout to their website, or through a contract supplier's catalog. Emory Express can also handle your order to a non-catalog supplier.
Shop for the following commodities by following the easy guidelines provided for each service or supply:
Audio-Visual
Office Supplies
Catering
Printing Services, Brochures and Publications
Cellular Phones and Pagers
Promotional Items
Computers, Printers, and Software
Records Storage of Emory Documents
Digital Copiers
Relocation of Faculty and Staff
Emory Education and Development
Shipping and Mail Services
Emory Photo/Video
Floral Arrangements
Surplus Property, Recycling, and Moves
Lab/Research Goods and Services, Lab Coats and Laundering
Travel for Faculty, Staff, and Guests
Procure & Pay Quicklinks
Emory Express
Supplier Announcements and Promotions
Looking Ahead with Procurement
Take Our Latest Poll
View Survey Results
PeopleSoft Expense Reports
PeopleSoft Payment Requests
Emory Report
CAMPUS NEWS

- ✓ A single place to get information and purchase goods and services
- ✓ Streamlined processes - - - saving time and money
- ✓ Provides data on what we buy, who we buy from, and what it costs
- ✓ Maximizes our buying power and significantly reduces risk

# Emory Express

EMORY EXPRESS is an easy to use application for the creation, submission, and approval of requisitions. The application is accessed via a secure website and its powerful search engine provides information on thousands of products.

EMORY EXPRESS also provides direct access to suppliers' websites (punch-out suppliers), forms to request non-cataloged items, and built-in internal controls.

- ✓ **Purchasing Guidelines**
  All eligible purchases should go through Emory Express.

- ✓ **Online Access**
  Via the internet with your Emory username and password.

- ✓ **Online Approvals**
  Approvals, if required, will be completed online.

- ✓ **Contract Suppliers (denoted with a ✱ )**
  Contract suppliers have University negotiated pricing. Purchase orders for contract suppliers are sent directly to the supplier via Express and do not need to go through Procurement Services unless they are $10,000 and greater.

- ✓ **Punch-out Suppliers**
  Suppliers who provide links to their websites within Express. Includes Staples, Fisher Scientific, Dell, Apple, Home Depot, etc.

- ✓ **Non-contract Suppliers**
  Requisitions to non-contract suppliers via the Product Search tool will go through Procurement if they are $2000 or greater before being electronically submitted to the supplier.

- ✓ **Non-Catalog Items**
  Available to request items that are not available through the hosted catalogs or punch-out suppliers. Requisitions go through Procurement if they are $1499 or greater.

- ✓ **Radiopharmaceuticals and Controlled Substances**
  All requisitions for Radioactive materials will continue to go to Radiation Safety and then to the vendor. All Radioactive deliveries must be made to the Radiation Safety Office (727-8784 or 727-5922).

  All requisitions for Controlled Substances will go to the Buyer in Procurement Services and then to the vendor. (Procurement must track all licenses.)

- ✓ **Multiple Suppliers/1 requisition**
  Several suppliers can be on the same requisition. The Purchase Order (P.O.) number will be assigned for each vendor. See purchasing tips for combining multiple suppliers on one requisition.

- ✓ **P-cards**
  Should be used for field purchases, conference registrations, cell phone bills, catering, grocery store purchases, etc. (See Appendix C)

- ✓ Department/Division determines purchasing limits and approval queues.

- ✓ Buyers will continue to be an integral part of the procurement process and are available for assistance

# Emory Express Purchasing Tips

The following tips will optimize the EMORY EXPRESS purchasing process.

## Multiple Suppliers on One Requisition

An unlimited number of suppliers can be placed on a single requisition; however please keep the following in mind:

- ✓ Requisitions are approved in their entirety. Keep approval workflow in mind when building carts:
  - POs for Contract suppliers ( ✱ ) are sent directly to the supplier and do not go through the Procurement Dept unless they are *$10,000 or greater.*
  - POs for Non-Contract suppliers are sent directly to the supplier and do not go through the Procurement Dept unless they are *$2,000 or greater.*
  - Non-Catalog Items are sent directly to the supplier and do not go through the Procurement Dept unless they are *$1,500 or greater.*
- ✓ New Suppliers should be in a separate cart.
- ✓ Radiopharmaceuticals should be in separate cart.

## Catalog Searches

- ✓ If an item cannot be located based on a part number, try locating it using the product search by product description (keywords). Suppliers frequently change their part numbers.
- ✓ If an item cannot be located by a part number or product description, use the supplier's punch-out (if available).
- ✓ Please contact e-market@emory.edu for any products that are not available through a contract suppliers' punch-out or hosted catalog.

## Punch-out Suppliers

- ✓ Punch-out suppliers are ideal for DNA sequencing orders.
- ✓ Once a punch-out item is placed in the Express shopping cart, the quantity cannot be changed. Confirm the quantity before placing a punch-out item into the Express shopping cart. (See 'Punch-outs' for help on changing the quantity once a punch-out item has been placed in the Express shopping cart.)

# Express Log-in

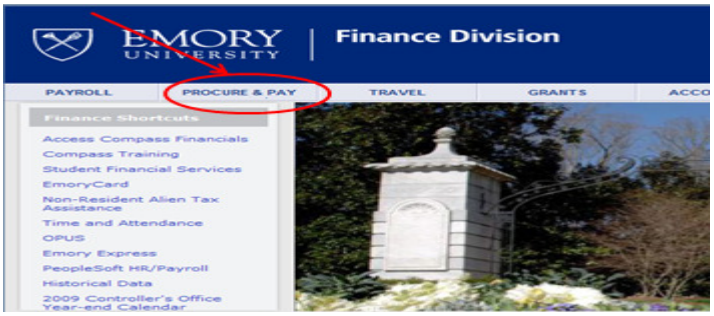
EMORY EXPRESS is easily accessible via the Internet and the Financial Operations website.

Faculty and staff who have been activated in Express can access the system with their Emory Username and Password.

## To Login:

1. Go to: www.finance.emory.edu

2. Click on the tab "PROCURE & PAY"




3. Click on the link "Buying in the Marketplace"

4. Click on the logo EMORY EXPRESS and sign in with your Emory ID And password

Emory's Marketplace - Where the Emory Campus can Purchase their Supplies and Services
Our Emory Marketplace provides you information on How to Buy and is the official launching point into Emory Express. Emory Express is where you can shop and purchase your supplies, equipment, and services from our contract suppliers through the Emory Express Punchout to their website, or through a contract supplier's catalog. Emory Express can also handle your order to a non-catalog supplier.
EMORY EXPRESS
Shop for the following commodities by following the easy guidelines provided for each service or supply:

***Note***: Please log out of Express **and** sign out of the Finance Division website to end the purchasing session.

# Help

There are several help features available in *EMORY EXPRESS*

Click on the ? to get additional details about the contents of the window.

Point the mouse to a feature or function. If the mouse becomes a ?, click once to view additional information.

Place the mouse on a symbol or icon and a tool tip/description will display

**Telephone Assistance**

(404) 727- 5400

Procurement Customer Care

**E-mail comments to**

e-market@emory.edu

# Screen Layout

The Emory Express screen is easy to navigate. There are 4 main sections

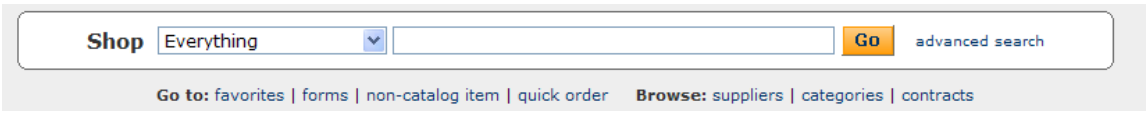
1) Header
2) Menu
3) Desktop: Bulletin Board
4) Desktop: Shopping Area

***Header***

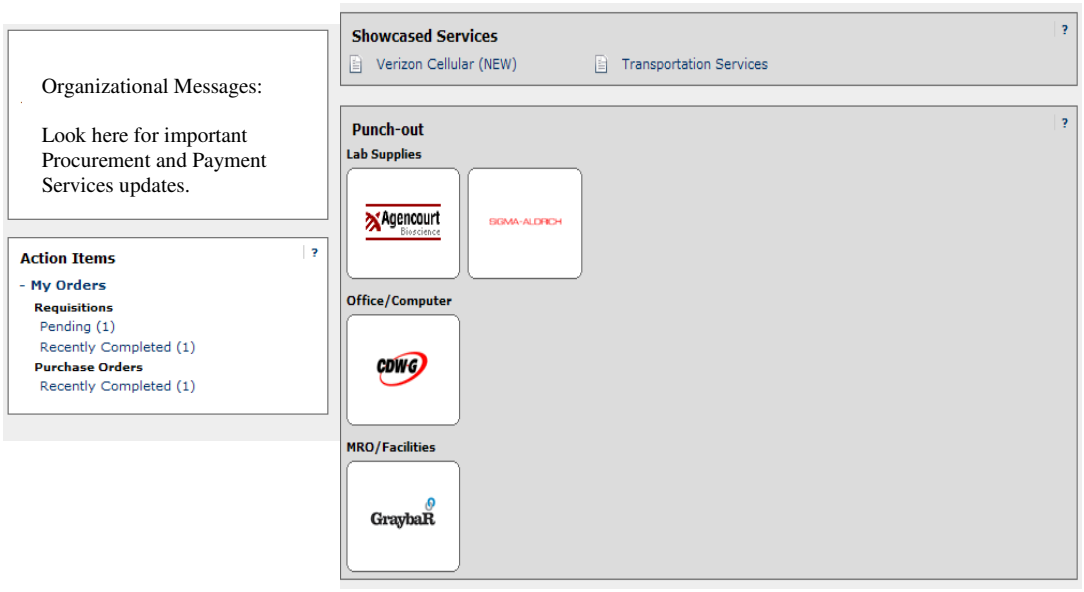
EMORY EXPRESS
Anne Enduser profile | logout
Home - Product Search
For Training Purposes | 4 item(s), 298.92 USD
Search for Catalog No. (SKU) Go

***Menu***

***Desktop: Shopping Area***
*Favorites, Search functions, Punch-outs, and Forms*


Shop Everything Go advanced search
Go to: favorites | forms | non-catalog item | quick order Browse: suppliers | categories | contracts

***Desktop: Bulletin Board***
*Organization Messages and User Review Info*



# Screen Layout
**cont'd**

## Header

EMORY EXPRESS
Anne Enduser profile | logout
Home - Product Search
For Training Purposes | 4 item(s), 298.92 USD
Search for Catalog No. (SKU)
Go

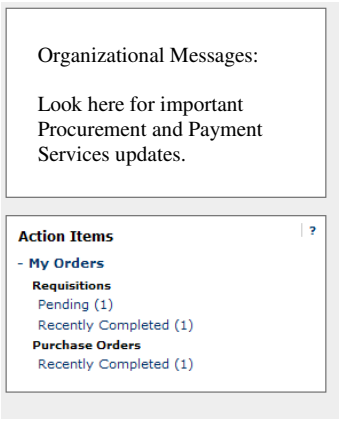
| | |
|---|---|
| EMORY EXPRESS | Click the logo to return to the Home page |
| User Name | The user name identified with the account (from Profile) |
| Profile | User ID, E-mail Preferences, Smart Keys and accounts, Addresses, Personal Settings, etc. |
| Logout | Ends Express and returns the user to the Finance Division website. |
| Location *(e.g Home-Quick Order)* | Current location in Emory Express |
| Cart | Active cart: number of items and total dollar amount |
| Search for | Searches for Part, PO, and Receipt numbers, etc. |

## Menu

| | |
|---|---|
| Home/Shop | Return to the Home Page |
| My Favorites | Create/Edit Favorite folders. Edit Favorite contents. |
| Forms | Access Organizational Forms |
| Carts | View active and draft carts, create or remove a cart |
| History | Information on submitted requisitions |
| Settlement | Settlement of receipts and invoices. |
| Profile | User ID, E-mail Preferences, Smart Keys and accounts, Addresses, Personal Settings, etc. |
| More>> | Other menu choices. |

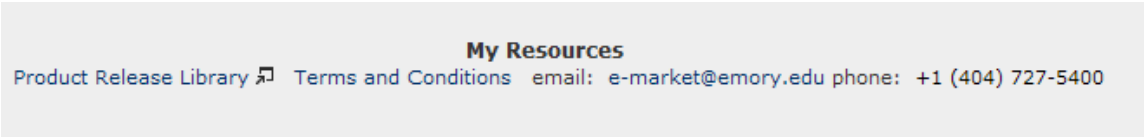
# Screen Layout
**cont'd**

## Desktop: Bulletin Board




| | |
|---|---|
| **Organization Message** | A bulletin board to display information for the end user community |

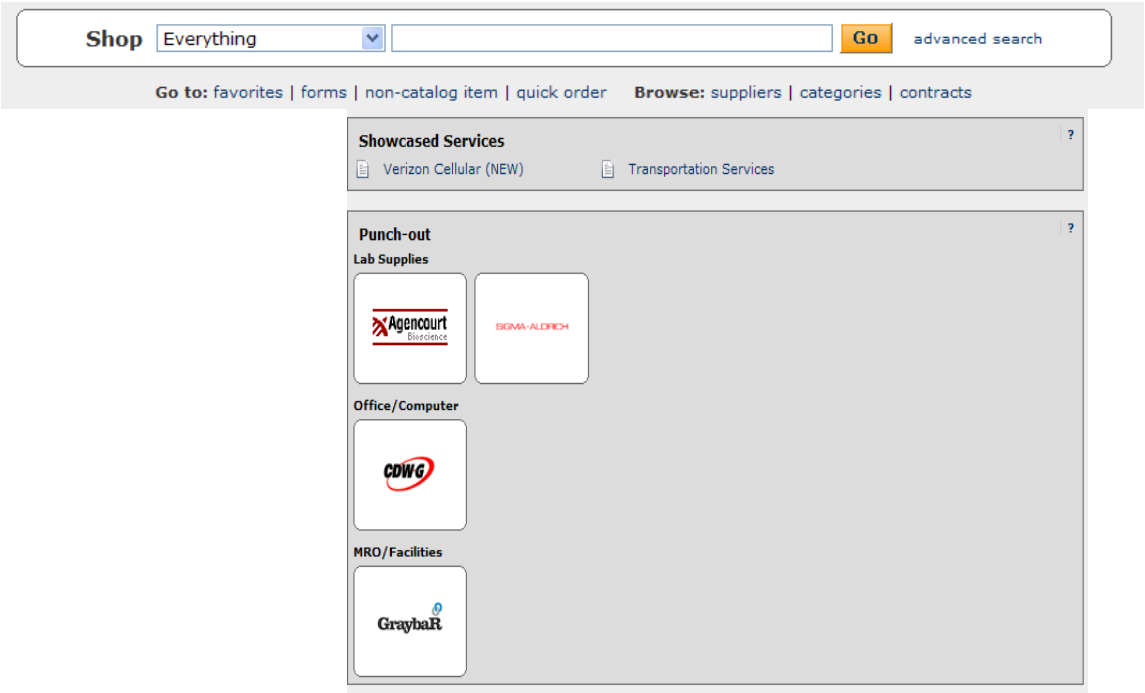
| | |
|---|---|
| **Action Items** | Quick view at the status of your requisitions. |




| | | |
|---|---|---|
| **My Resources** | **Recent Enhancements** | Includes release notes and details about new features |
| | **E-mail** | System support administrator e-mail |
| | **Phone** | System support phone |

# Screen Layout
**cont'd**

## Desktop: Shopping Area




| | |
|---|---|
| **Shop** | Drop down arrow used to narrow the search. Use **Everything** for the broadest search. |
| **Favorites** | Items that have been saved as a **favorite**. (Create Favorite folders or edit favorites using **My Favorites** on the menu.) |
| **Forms** | Emory forms for special items and services. |
| **Non-Catalog Item** | For products not available through "shop" or the Punch-outs. Also used for special promotions and quotes not available in the Punch-outs. |
| **Quick Order** | Search for products in Express using the part number/SKU |
| **Other Searches** | By Supplier, By Category, By Contract. |
| **Punch-out** | Direct access to suppliers' online catalogs |

# Profile

The profile contains user information and preferences. Some settings are determined by the department/division administration or Procurement Services.

Users can customize the following profile areas.

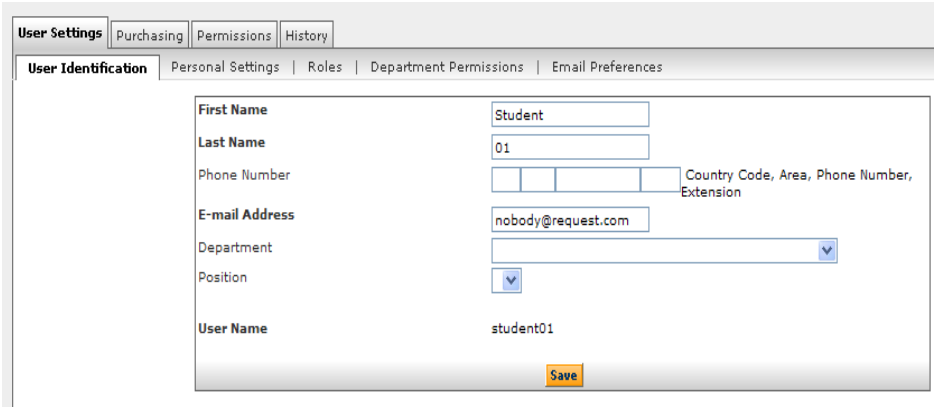
**User Settings**: User ID, Personal Settings, and E-mail notification preferences

**Purchasing:** Custom codes - Smart Keys and Accounts
Addresses - Ship To and Bill To addresses

## Access the profile

Choose **profile** in the Header

**Profile**




| | |
|---|---|
| **User Settings** | User Identification, Personal Settings, E-mail Preferences. |
| **Purchasing** | Smart Keys, accounts, shipping addresses. |
| **Permissions** | Options determined by the department or Procurement. |
| **History** | An audit trail of additions/modifications made to the user's profile. |

# Profile
**cont'd**

1st time users should review or edit the following profile settings.

**User Settings Tab**

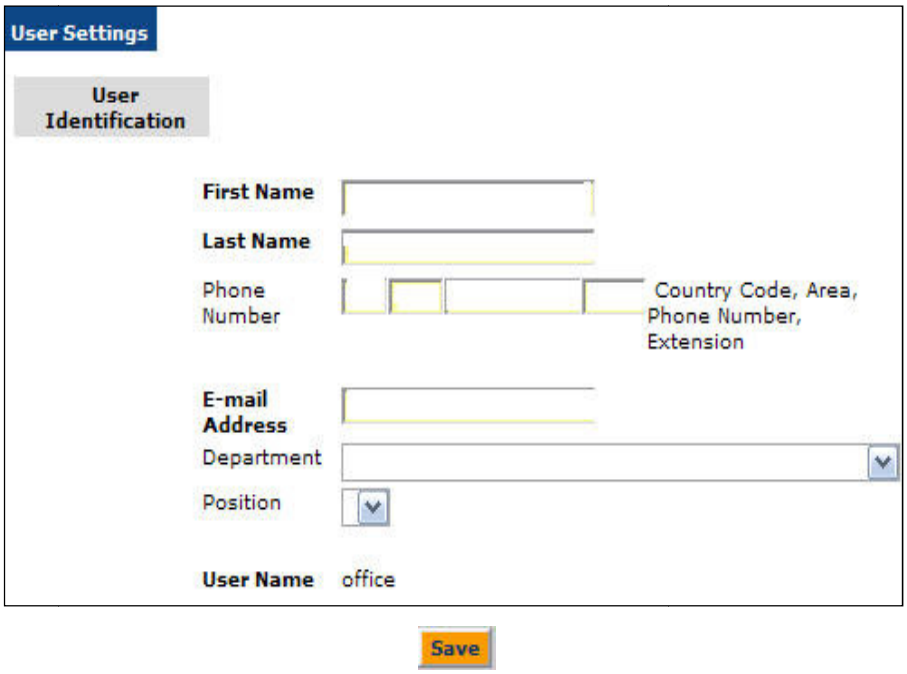
- ✓ User Identification (Position is not used)
- ✓ E-mail Preferences

**Purchasing Tab**

- ✓ Custom Codes – Smart Keys and Accounts
- ✓ Shipping Address(es)
- ✓ Billing Address

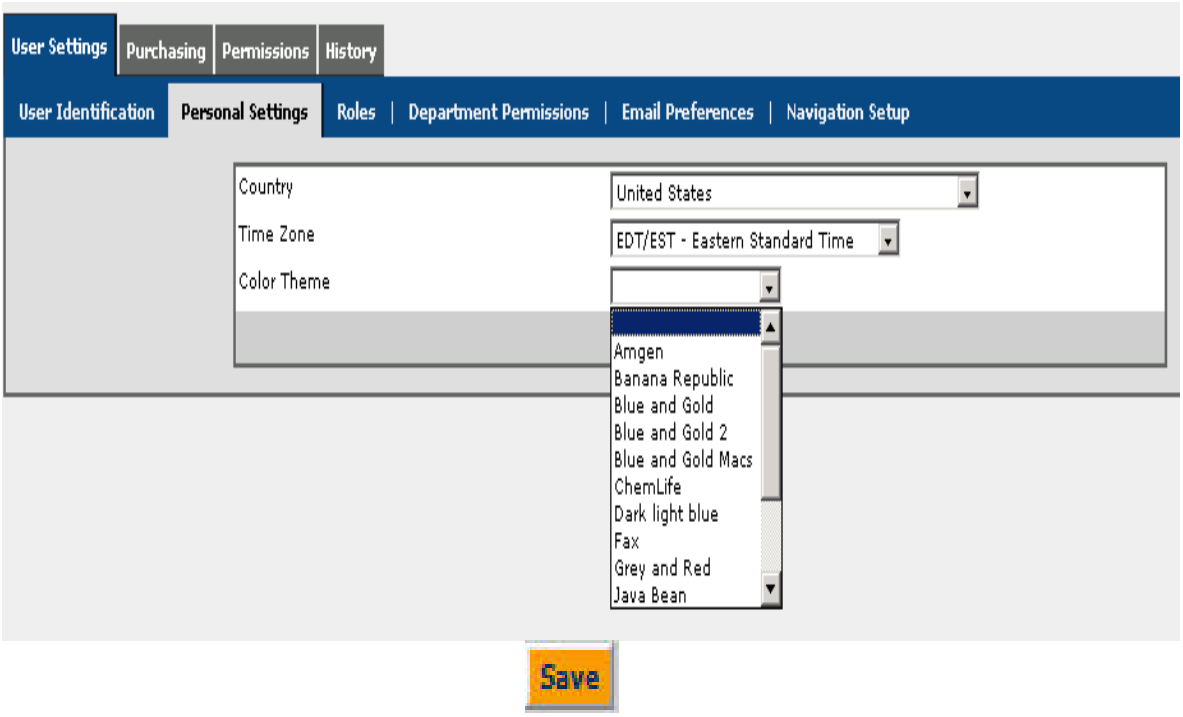
**Profile: User Identification**

1. Select Profile
2. Select **User Settings**
3. Select **User Identification**
4. Edit info, if applicable.
4. Save



## Personal Settings

Express provides the ability to identify your country, time zone and change the color theme on your screen.



## Profile: E-mail Preferences

1. Select **Profile**
2. Select **User Settings**
3. Select **Email Preferences**
4. Click the ☐ to select or deselect a notification.
5. Note: It is recommended to select notifications:

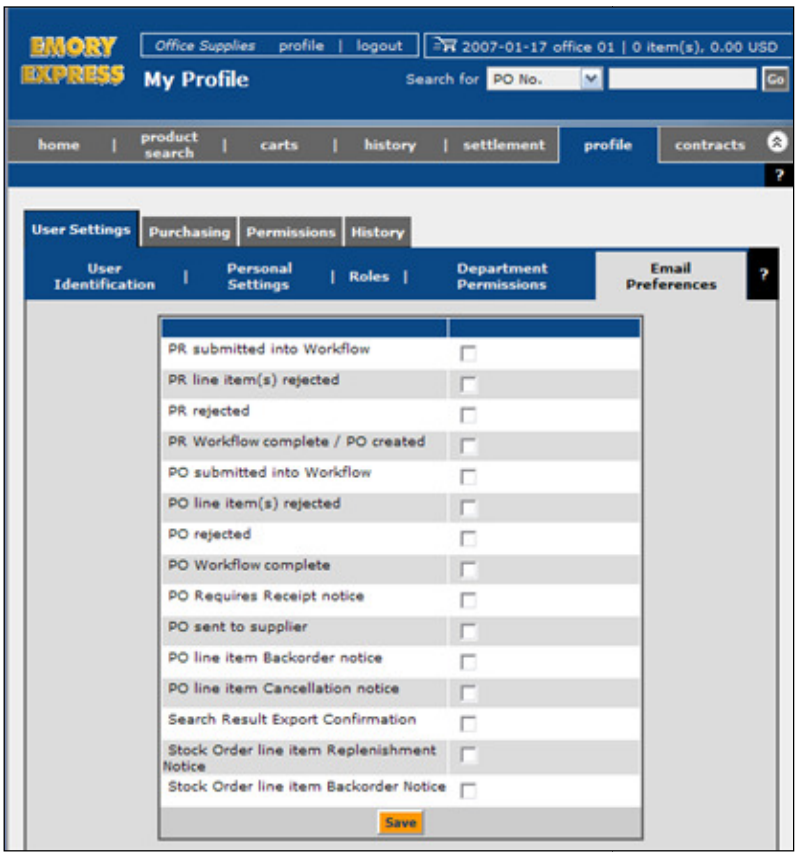
   PR line item rejected

   PR rejected

   PO line item rejected

   PO rejected

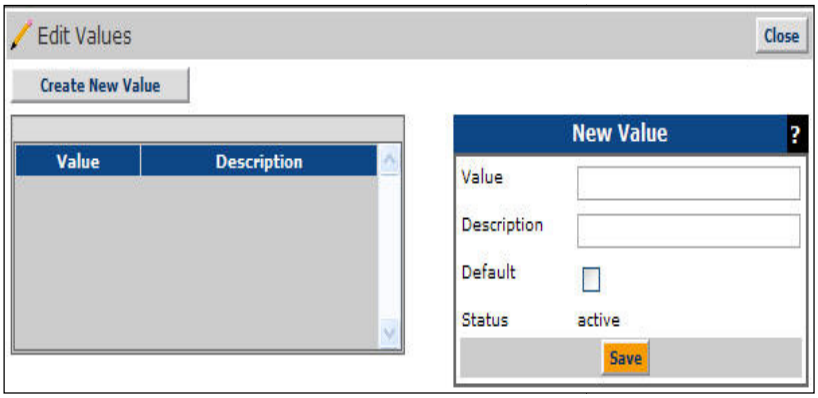
   PO Requires Receipt Notification


EMORY EXPRESS
Office Supplies profile | logout
2007-01-17 office 01 | 0 item(s), 0.00 USD
My Profile
Search for PO No. Go
home | product search | carts | history | settlement | profile | contracts
User Settings
Purchasing
Permissions
History
User Identification | Personal Settings | Roles | Department Permissions | Email Preferences
PR submitted into Workflow
PR line item(s) rejected
PR rejected
PR Workflow complete / PO created
PO submitted into Workflow
PO line item(s) rejected
PO rejected
PO Workflow complete
PO Requires Receipt notice
PO sent to supplier
PO line item Backorder notice
PO line item Cancellation notice
Search Result Export Confirmation
Stock Order line item Replenishment Notice
Stock Order line item Backorder Notice
Save

6. Save.

## Profile: Smart Keys

1. Select **Profile** from the header
2. Select **Purchasing**
3. Select **Custom Fields**
4. **Smart Keys**: Select **Edit** to add, view, or change info.
5. Select **Create New Value**
6. **New Value**: Enter a Smart Key on the Value line
7. Choose **Default ,** as applicable
8. **Save**




Repeat as needed

## Profile: Account Codes

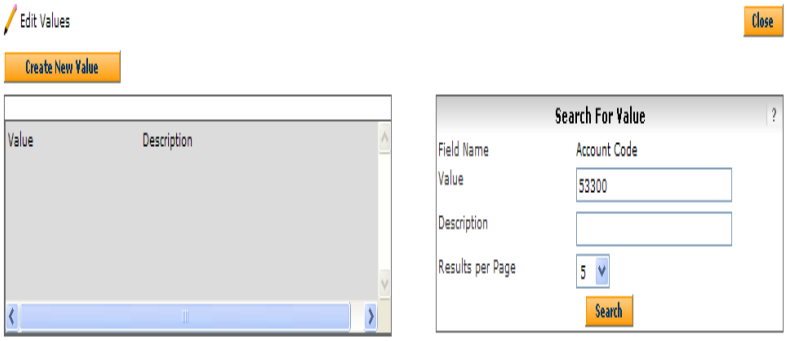
1. Select **Profile** from the header

2. Select **Purchasing**

3. Select **Custom Fields**

4. **Account codes**: Select **Edit** to add, view, or change info.

5. Select **Create New Value**




6. **New Value**: Enter an Account Code on the Value line

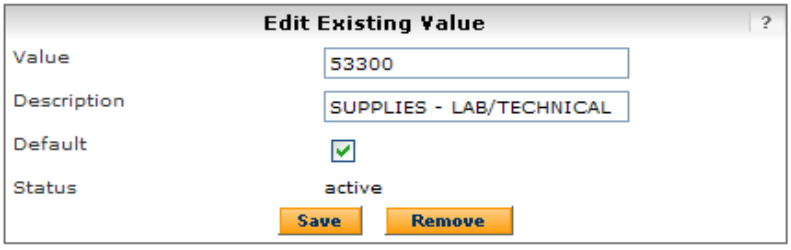
7. **Search**

8. Select the Value

9. **Add Values**

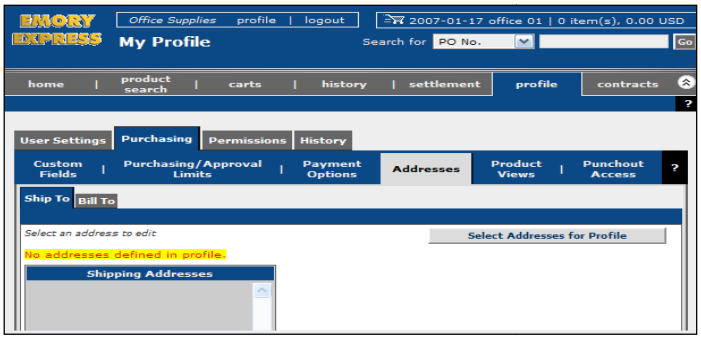
Repeat as needed

**To default your Account Code, select the link on the right and click default on the left.** **Save**

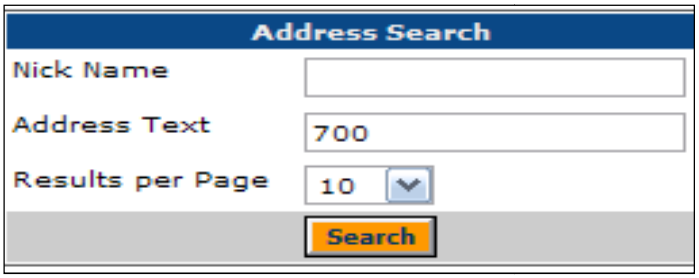


## Profile: Addresses - Ship To

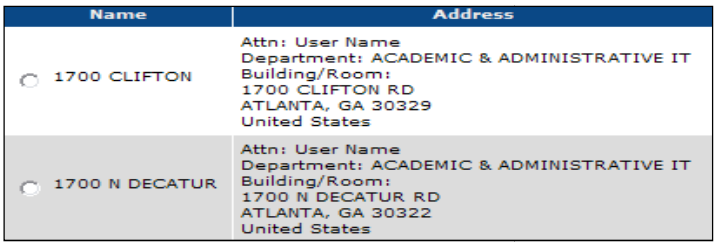
1. Select **Profile**
2. **Purchasing** tab
3. **Addresses** tab
4. **Ship To** tab
5. 


EMORY EXPRESS
Office Supplies | profile | logout
2007-01-17 office 01 | 0 item(s), 0.00 USD
My Profile
Search for PO No.
Go
home | product search | carts | history | settlement | profile | contracts
User Settings | Purchasing | Permissions | History
Custom Fields | Purchasing/Approval Limits | Payment Options | Addresses | Product Views | Punchout Access
Ship To | Bill To
Select an address to edit:
Select Addresses for Profile
No addresses defined in profile.
Shipping Addresses

6. Enter the numeric or text portion of the address, e. g. *700* or *Jesse*. Choose **Search**




7. Click on the circle in front of the address

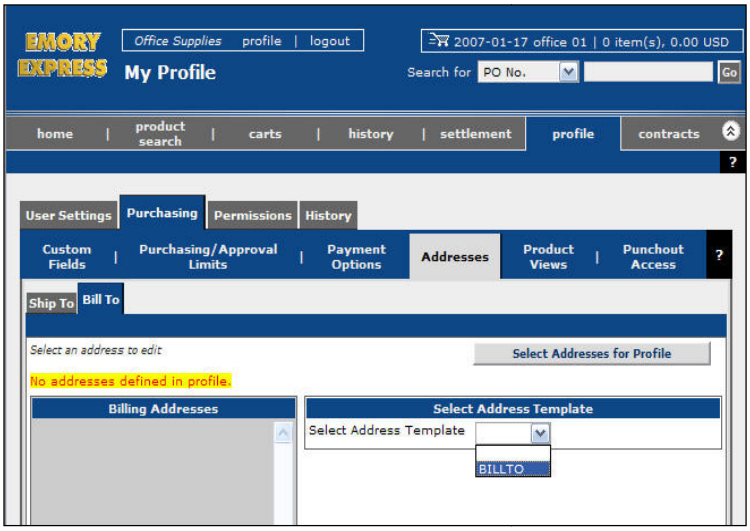


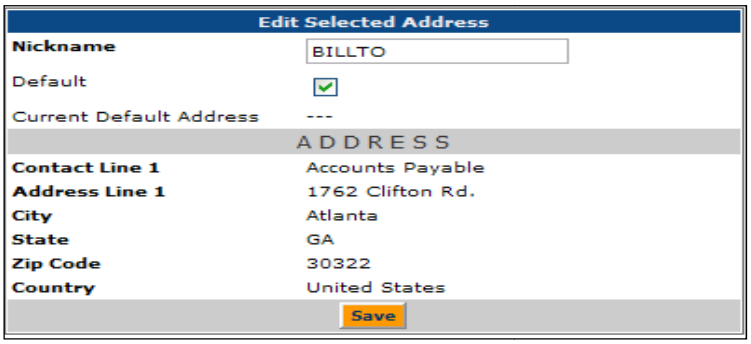

8. Change the nickname and/or indicate default (optional)
9. Add or edit the Attn:, Building, Dept/Room (mandatory)
10. Save

# Profile: Addresses - Bill To

Invoices will be sent to Emory's Payment Services (A/P).

1. Select **Profile**
2. **Purchasing** tab
3. **Addresses** tab
4. **Bill To** tab
5. Click on
6. From Pull Down Menu, Select Address Template BILL TO
7. Save

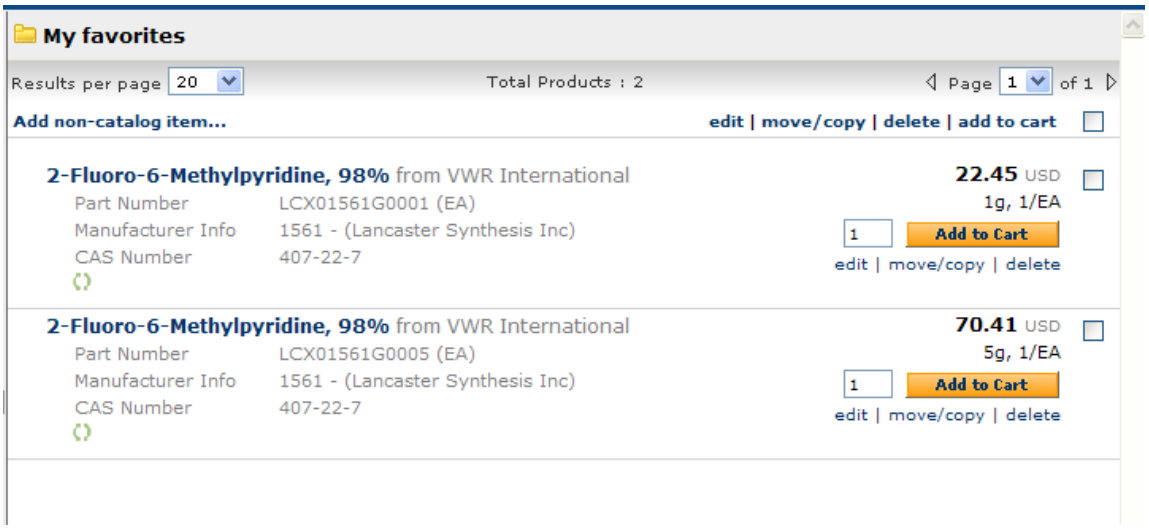

EMORY EXPRESS
Office Supplies profile | logout
2007-01-17 office 01 | 0 item(s), 0.00 USD
My Profile
Search for PO No. Go
home | product search | carts | history | settlement | profile | contracts
User Settings | Purchasing | Permissions | History
Custom Fields | Purchasing/Approval Limits | Payment Options | Addresses | Product Views | Punchout Access
Ship To | Bill To
Select an address to edit
Select Addresses for Profile
No addresses defined in profile.
Billing Addresses
Select Address Template
Select Address Template
BILLTO



# Favorites

The **Favorites** link allows for quick access to Personal Favorites

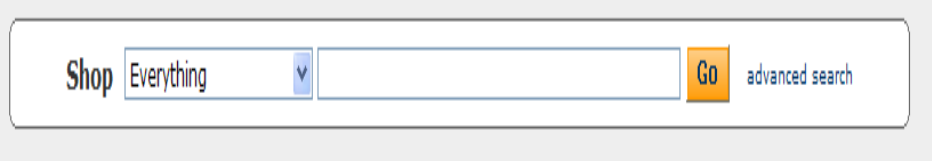
Enter the quantity of items you want to order and select the Add to Cart button.

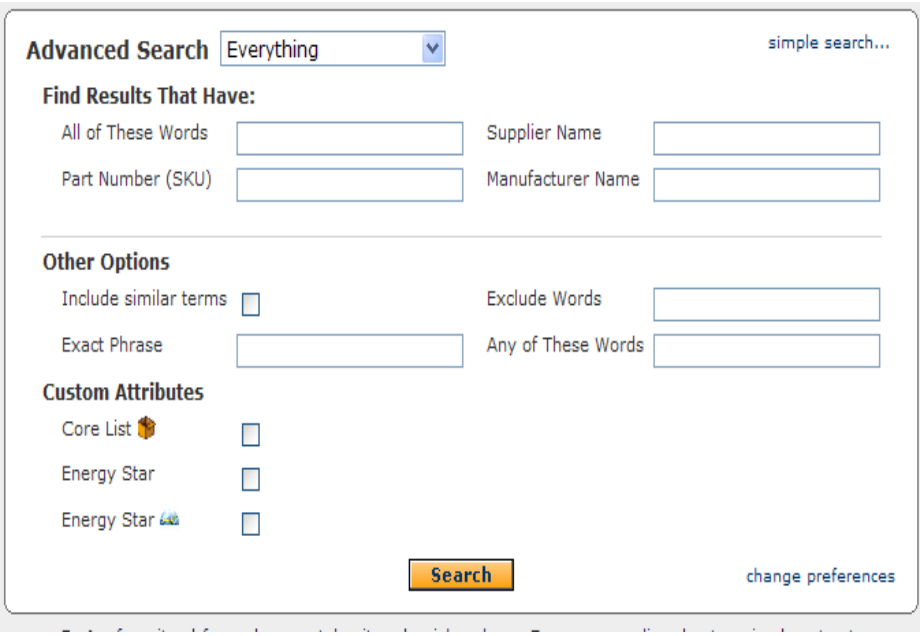


# Choosing Products

**Shop** provides the tools to search the catalogs within Express. You can view and compare products within a product category, add items to your shopping cart, or add items to your Favorites list.

1. To search within a product category, click the drop down arrow and select the category.
2. Enter the Product Description, Part (SKU) number, or supplier name.
3. For additional search criteria, choose **advanced search**.
4. Use **Include Similar** terms if the exact spelling is not known



# Choosing Products
**Cont'd**

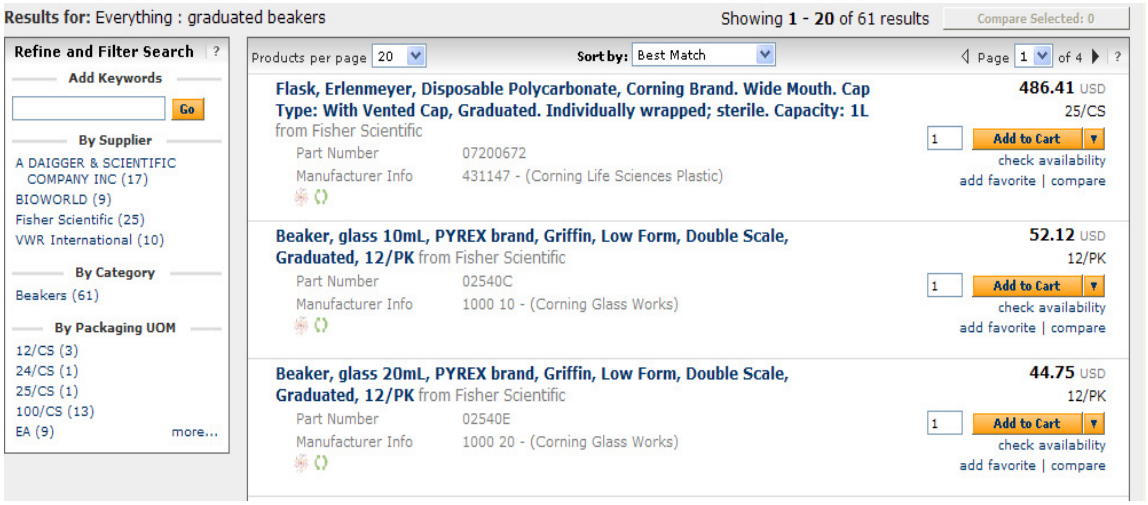
Multiple Search criteria may be used.

| | |
|---|---|
| **advanced search**<br>**simple search** | Display or hide multiple search lines (one for each of the search functions described below.) |
| **Find Results That Have:** | |
| All of these words | Displays products that have *all* of these words. |
| Supplier Name | Results will display all products for the requested supplier. |
| Part No. (SKU) | Results will be products that match the part/SKU number. Separate multiple numbers with spaces. |
| Manufacturer Name | Results will display all products for the requested manufacturer. |
| **Other Options** | |
| Include similar terms | Use if the exact spelling/ part number is unknown. |
| exact phrase | Displays products containing the entire search string, including spaces and punctuation. |
| exclude words | Another Product Description must be used with this function. The results will be the products matching the other criteria that don't include these words. |
| any of the words | Displays products that contain *any* of the words. Products with more than one match will display first. |
| **Products per page** | 20 to 200 per page. The number here is remembered between searches. Only results on the same page can be compared to one another. |

# Search Results

**Most preferred supplier**: indicates top choice suppliers for Emory

**Contract supplier**: Emory negotiated discount pricing with these suppliers

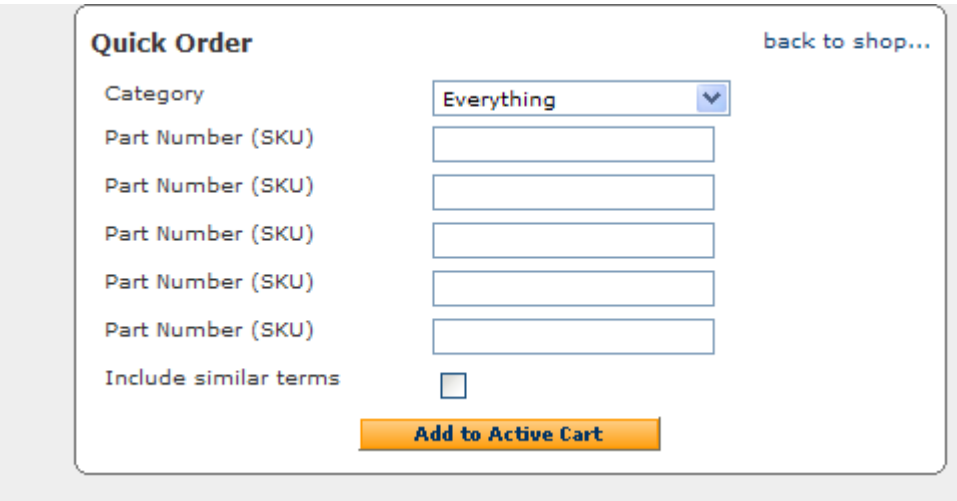

Results for: Everything : graduated beakers
Showing 1 - 20 of 61 results
Compare Selected: 0
Refine and Filter Search
Add Keywords
Go
By Supplier
A DAIGGER & SCIENTIFIC COMPANY INC (17)
BIOWORLD (9)
Fisher Scientific (25)
VWR International (10)
By Category
Beakers (61)
By Packaging UOM
12/CS (3)
24/CS (1)
25/CS (1)
100/CS (13)
EA (9)
more...
Products per page 20
Sort by: Best Match
Page 1 of 4
Flask, Erlenmeyer, Disposable Polycarbonate, Corning Brand. Wide Mouth. Cap Type: With Vented Cap, Graduated. Individually wrapped; sterile. Capacity: 1L from Fisher Scientific
Part Number 07200672
Manufacturer Info 431147 - (Corning Life Sciences Plastic)
486.41 USD
25/CS
Add to Cart
check availability
add favorite | compare
Beaker, glass 10mL, PYREX brand, Griffin, Low Form, Double Scale, Graduated, 12/PK from Fisher Scientific
Part Number 02540C
Manufacturer Info 1000 10 - (Corning Glass Works)
52.12 USD
12/PK
Add to Cart
check availability
add favorite | compare
Beaker, glass 20mL, PYREX brand, Griffin, Low Form, Double Scale, Graduated, 12/PK from Fisher Scientific
Part Number 02540E
Manufacturer Info 1000 20 - (Corning Glass Works)
44.75 USD
12/PK
Add to Cart
check availability
add favorite | compare

- ✓ Refine and filter your search by Supplier, Category, or Packaging using the links to the left
- ✓ Enter the number of items and select the Add to Cart button to begin your order
- ✓ Select the add to favorite link to save this to your personal favorites list
- ✓ Select the compare link for multiple items to compare selected
- ✓ Use sort by feature to list results based on best match, part number, unit of measure and price.

# Quick Order

**Quick Order** is a convenient way to add items to a cart when the part number or SKU is known. **Quick Order** searches supplier and manufacturer catalogs.

1. Select the **Category** (*Everything* provides the broadest search.)
2. Enter the part number(s)
3. Select **Add to Active Cart**.




- ✓ If only one item is a match, it is added to the active cart.
- ✓ If multiple matches are found, an index displays the results by Supplier and by Category
- ✓ If no matches are found, a **Non-catalog Item link** will display

# Punch-outs

Punch-outs are direct access to suppliers' websites. Users can search for products and add them to the Express shopping cart.

Punch-outs are in categories, e.g. Lab supplies, Office/Computer.

1. Click the supplier's icon.

2. Search for products, add them to the cart, and complete your order.

   You will be returned to the Emory Express cart.

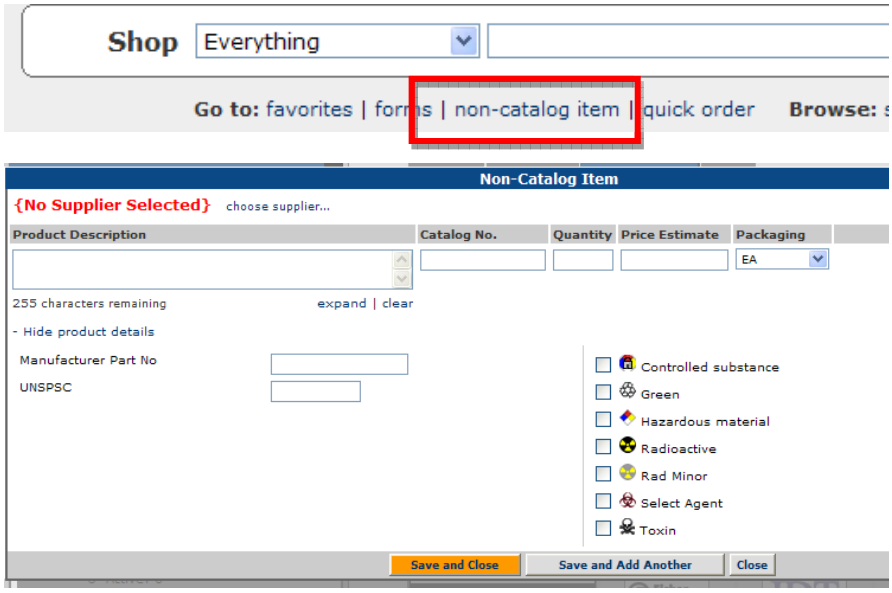
To return to Express without any products, choose Cancel Punch-out

- ✓ A punch-out with a yellow triangle in a circle is currently running slowly.
- ✓ A punch-out with a red x in a circle is currently not available.

# Non-Catalog Item

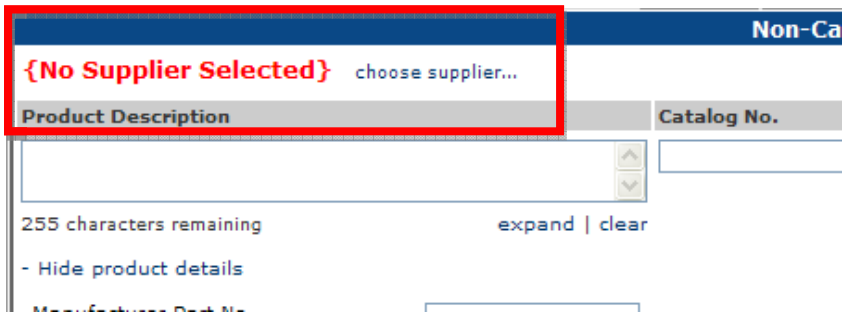
The Non-Catalog item is used to request items that are not available through Express or have other special requirements such as quoted pricing.

1. Select **Non-Catalog Item**.

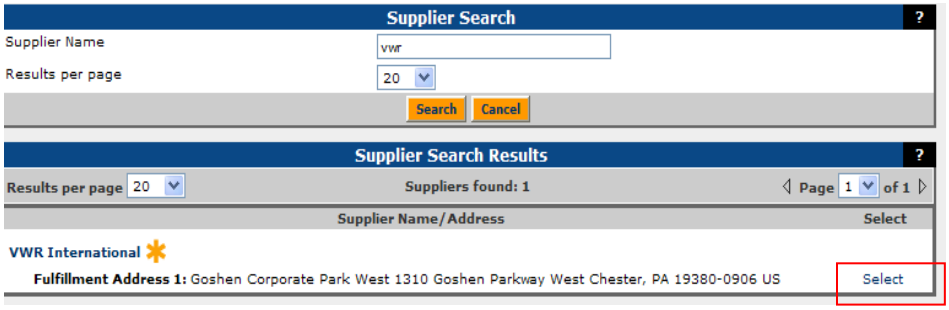


# Non-Catalog Item
**Cont'd**

2. Click on **Choose Suppler** to input Supplier Name. Enter a partial name of the supplier for maximum results. If your supplier is not found, enter **New Supplier.**




3. **Select** the correct supplier.



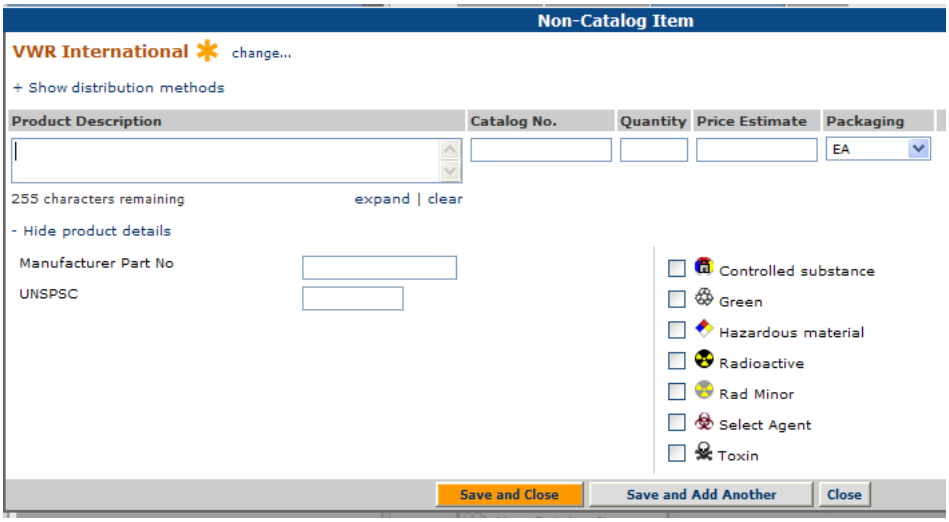

4. Provide the **product name** and a detailed **description**, and New supplier information.

5. Enter the **Part Number.**

6. Enter the **quantity**.

7. Enter the **confirmed price**.

8. Enter the Manf Name and Part No (optional)



# Non-Catalog Item
**Cont'd**

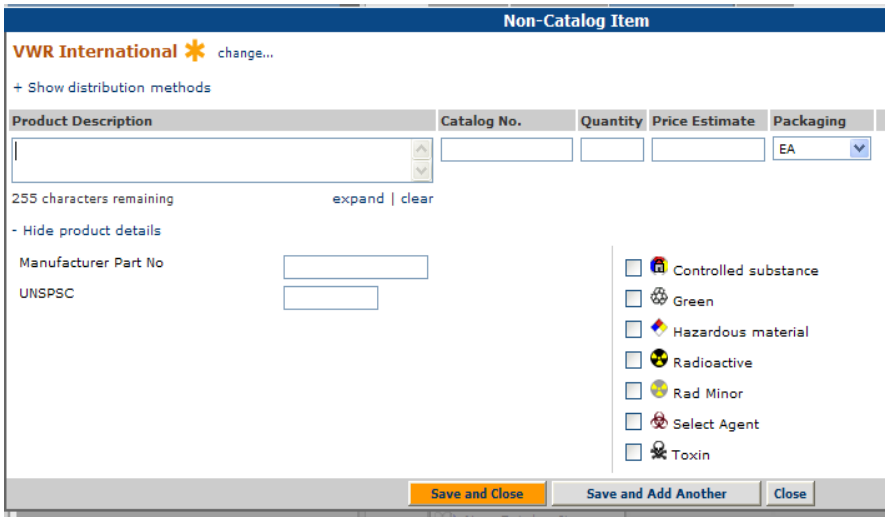
**9. Available Actions:**

a. One Item:

b. Multiple items:

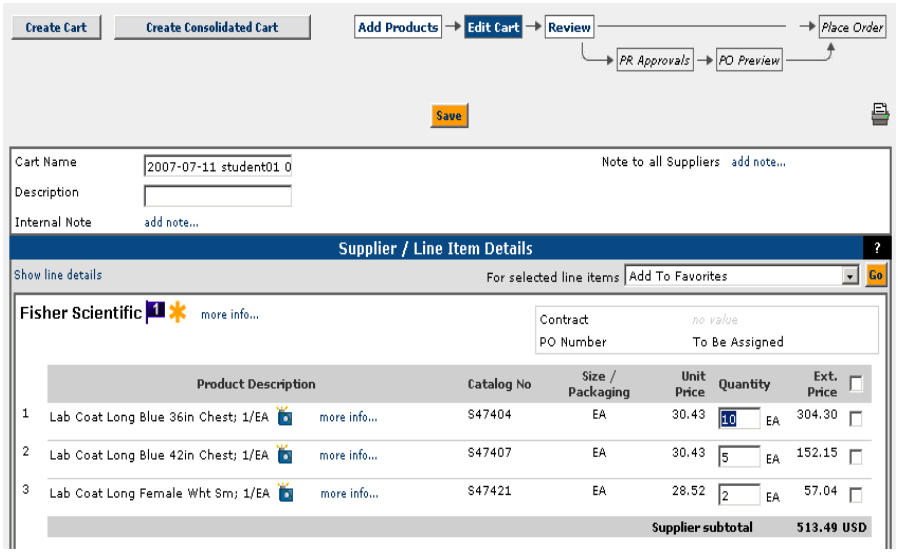
Repeat 4-8.

**10.** See page 32 for attaching quotes.



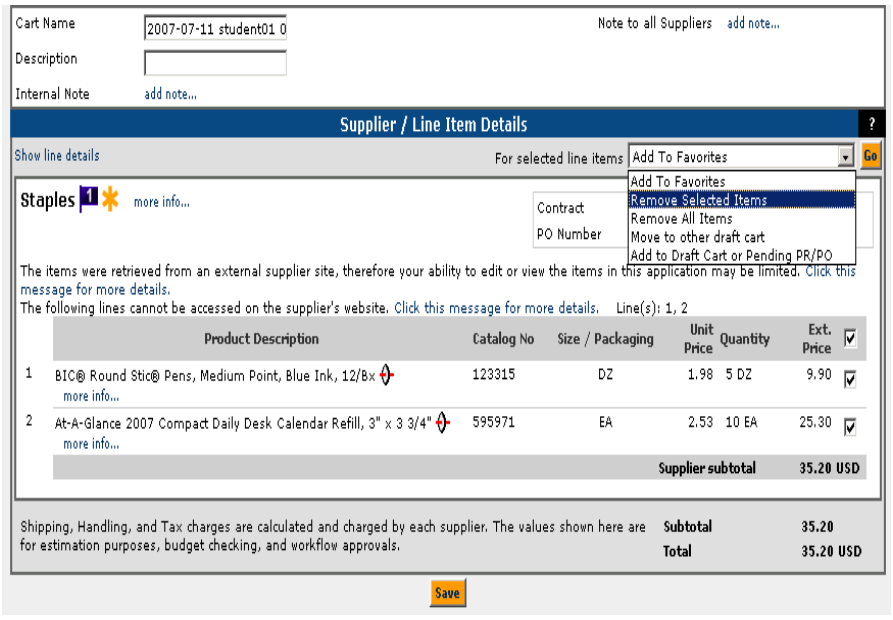
# Edit Cart

Edit cart allows the user to change quantities for catalog products and delete punch-out supplier orders.




1. **Change the quantity of a hosted catalog item:** type in the new quantity.

2. Save


Cart Name
2007-07-11 student01 0
Description
Internal Note
add note...
Note to all Suppliers
add note...
Supplier / Line Item Details
Show line details
For selected line items
Add To Favorites
Go
Add To Favorites
Remove Selected Items
Remove All Items
Move to other draft cart
Add to Draft Cart or Pending PR/PO
Staples
more info...
Contract
PO Number
The items were retrieved from an external supplier site, therefore your ability to edit or view the items in this application may be limited. Click this message for more details.
The following lines cannot be accessed on the supplier's website. Click this message for more details. Line(s): 1, 2
Product Description
Catalog No
Size / Packaging
Unit Price
Quantity
Ext. Price
1 BIC® Round Stic® Pens, Medium Point, Blue Ink, 12/Bx more info... 123315 DZ 1.98 5 DZ 9.90
2 At-A-Glance 2007 Compact Daily Desk Calendar Refill, 3" x 3 3/4" more info... 595971 EA 2.53 10 EA 25.30
Supplier subtotal 35.20 USD
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.
Subtotal 35.20
Total 35.20 USD
Save

3. **Change the quantity of punch-out item(s):**.

a. Select all of the punch-out's items.

b. Choose **Remove Selected Items** from the pull-down menu

c. Select Go

d. Return to the punch-out's website to shop again

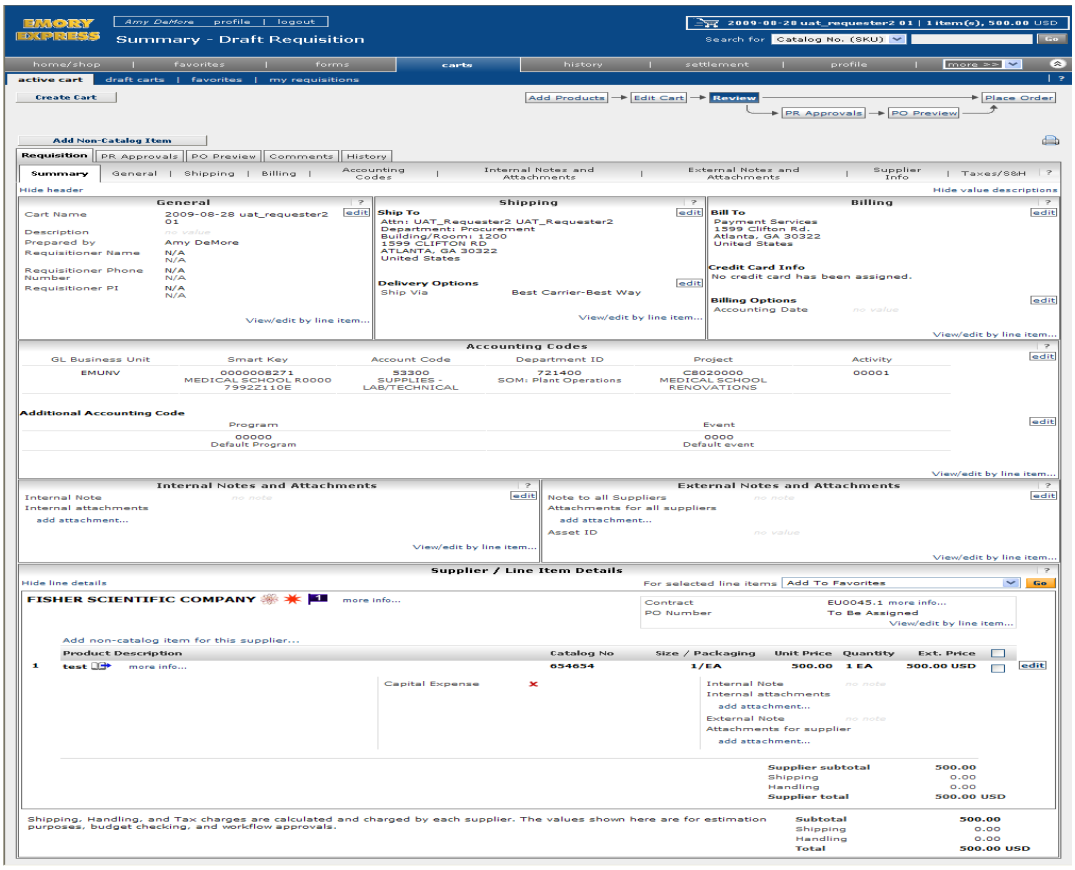
# Review Cart

**The Review command provides functionality to view, add, or change:**

- ✓ The Summary information and Line Item detail(s)
- ✓ Shipping and delivery options -including deliveries to different locations
- ✓ Accounting codes -including distributions to multiple accounts
- ✓ Internal or external notes and attachments, per cart or per line item

The Review function displays the **Requisition Summary**:

- ✓ Information **above** the Supplier/Line Item Details is header information and will be applied to every item in the requisition
- ✓ Information **below** the Supplier/Line Item Details can be added or changed for each individual line item



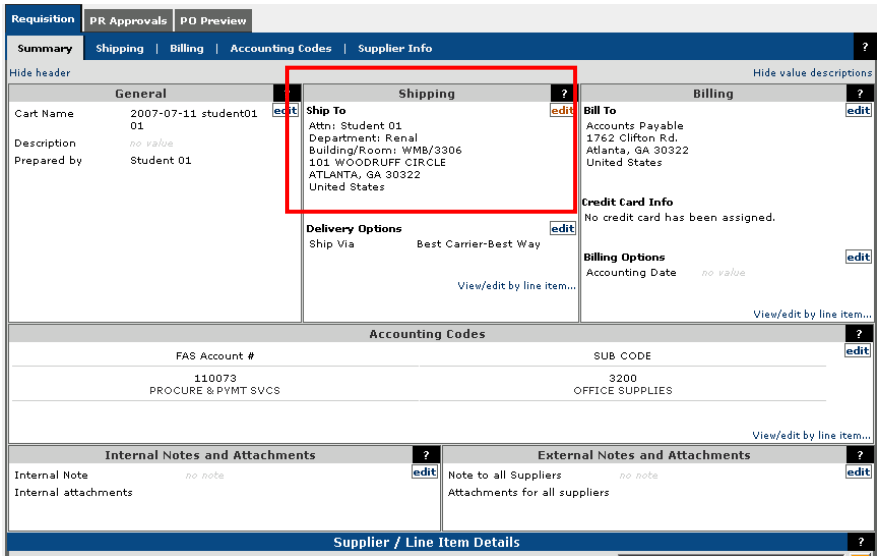
# Review Cart Summary

The Requisition Summary tab applies changes to all items in a requisition. Note: you must edit fields **above** the Supplier / Line Item Details line to apply to all items.

1. **Ship To** - To change delivery address for the requisition, click edit in the Shipping section.

   a. Select Alternate address from Profile Values pull down menu.

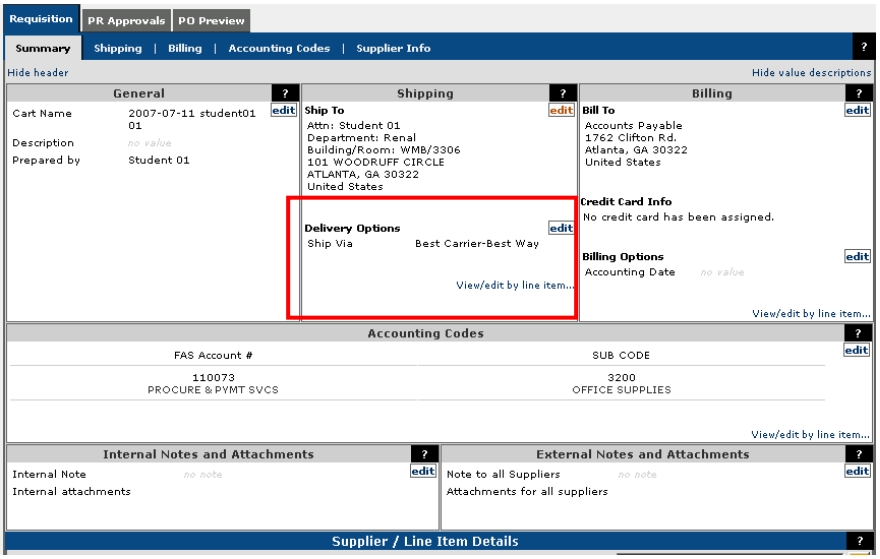
   b. Save



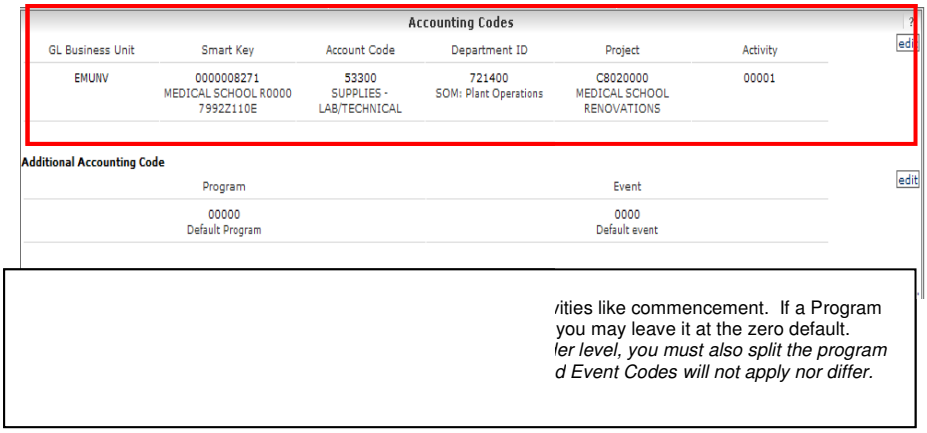

2. **Delivery Options** - To change delivery options for the requisition, click edit in the Delivery Options section.

   a. Select Alternate option from Ship Via pull down menu.

   b. Save



3. **Accounting Codes -** To change Smart Keys or accounts for a req, click edit in the Accounting Codes section.

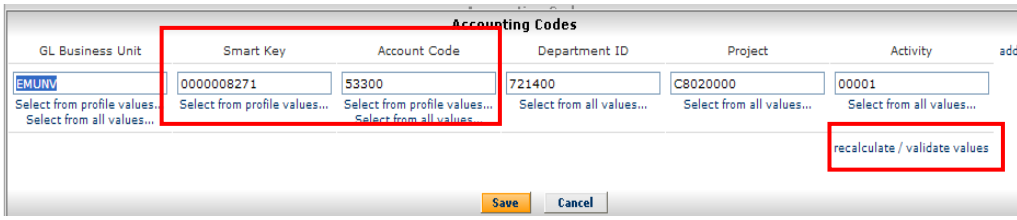



ities like commencement. If a Program you may leave it at the zero default.
*ler level, you must also split the program d Event Codes will not apply nor differ.*

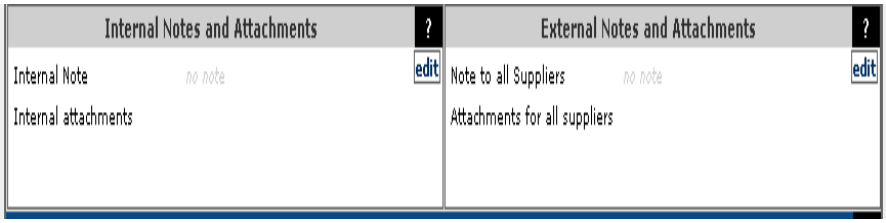
a. Type in a new Smart Key and/or Account Code only. To select codes from the profile, click on Select From Profile Values . . . and choose from the pull down menu.

b. Click the recalculate/validate values… link

c. Save

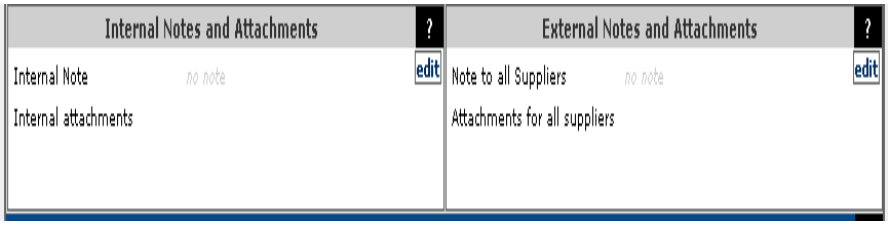



4. **Internal Notes** (viewable by Emory personnel only). Notes for Emory including any **New Supplier** information Click edit and type the note.



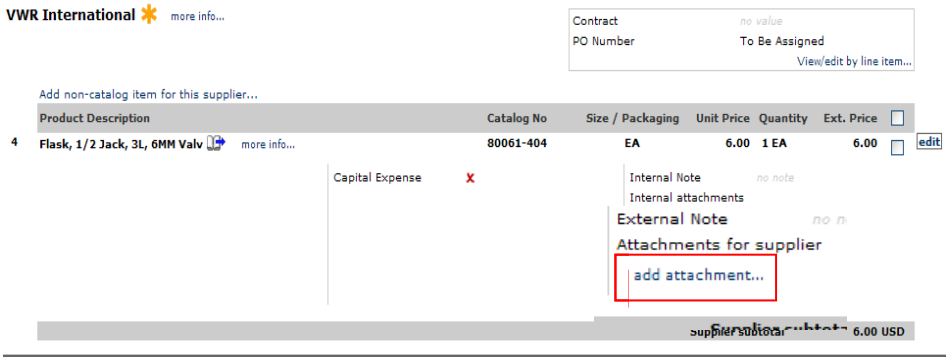
# Review Cart Summary
**Cont'd**

4. **External Notes** (viewable by the supplier and Emory personnel). Click edit and type the note.

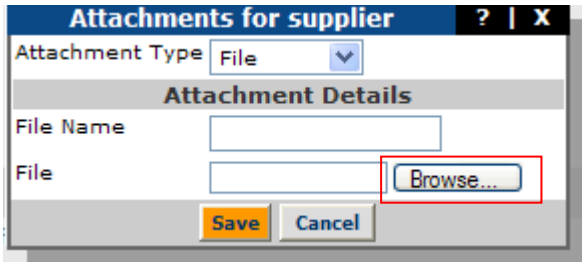



5. Documentation, quotes, and web URLs should be added at the line item level

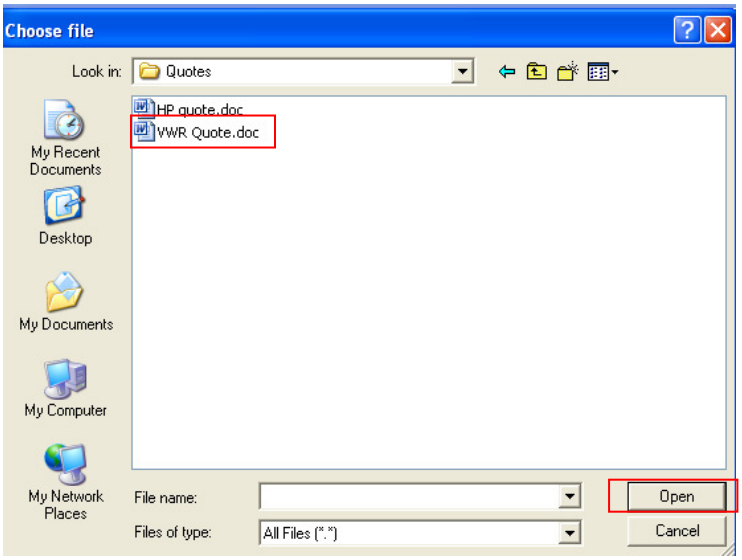
   **a.** Click **add attachment** under External notes



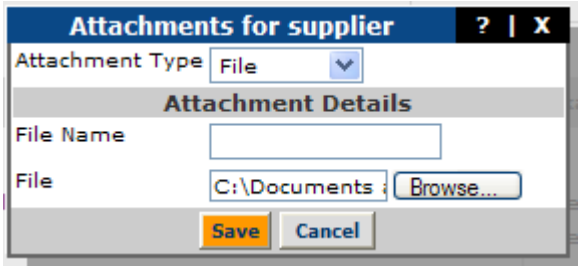

   **b.** Click **Browse**



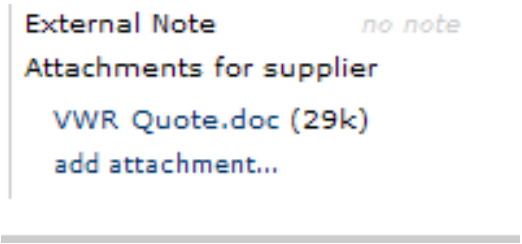
**c.** Locate the file, Click on the **filename** and select **Open.**




**d.** Click **Save.**




**e.** The filename will display



# Review Cart: Shipping

The Shipping tab applies address and delivery option changes to individual items in a requisition. Note: you must edit fields **below** the Supplier / Line Item Details line to edit individual line items.

1. **Line item - Shipping** To change the delivery address or delivery options for **per line item**, click on the **Shipping tab**.

   To change the delivery address for a specific item, click edit to the right of Ship To in the product description.

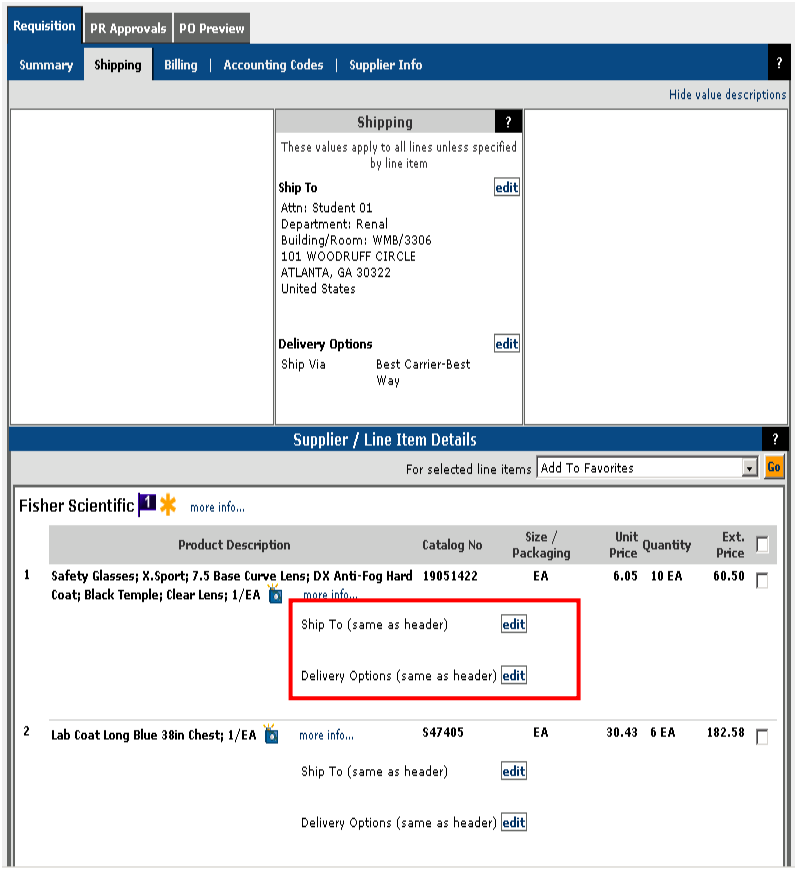
   a. Select Alternate address from Profile Values pull down menu.

   b. Save

   To change the delivery options for a specific item, click edit to the right of Delivery Options.

   a. Select Alternate option from Ship Via pull down menu.

   b. Save



# Review Cart: Accounting Codes

The Accounting Codes tab applies Smart Key and Account Code changes to individual items in a requisition. Note: you must edit fields **below** the Supplier / Line Item Details line to apply to all items.

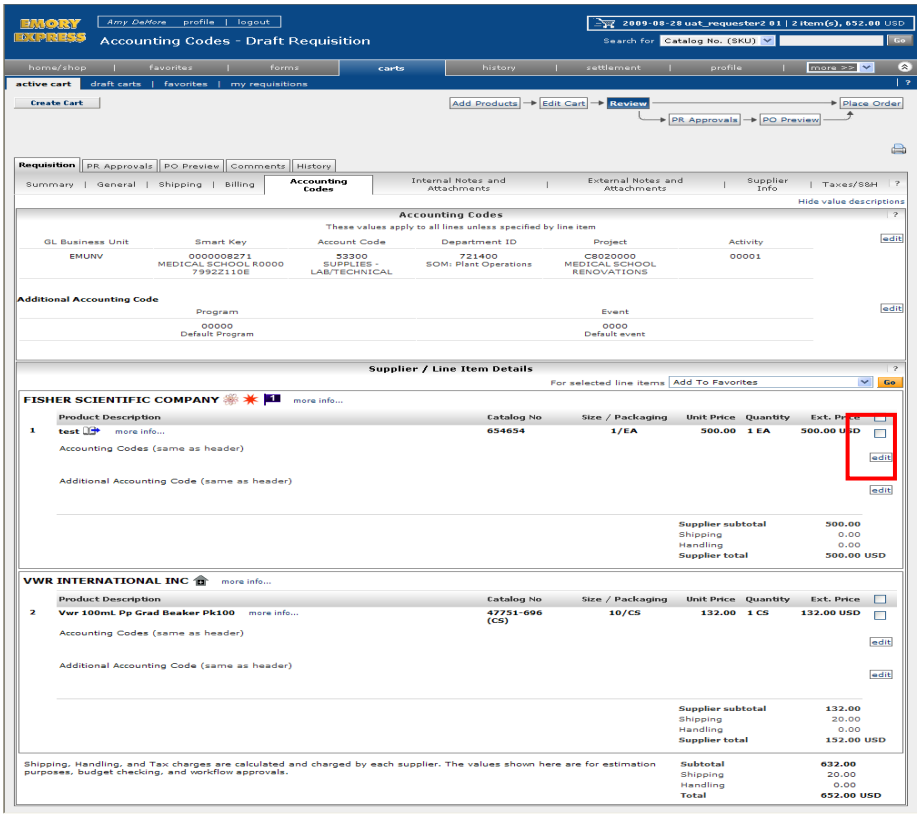
1. **Line item - Accounting**
   To change Smart Key or accounts **per line item**, click on the **Accounting Codes tab**.

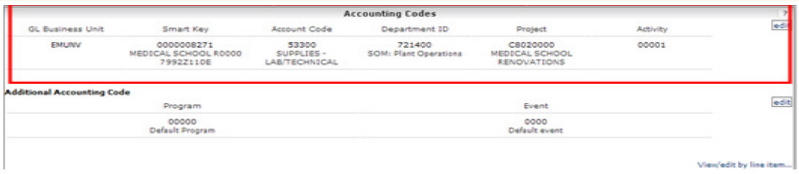
2. To change a Smart Key or account for an item, click edit to the right of Accounting Codes in the product description.

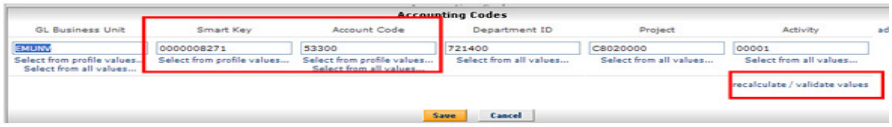
   a. a. Type in a new Smart Key and/or Account Code only. To select codes from the profile, click on Select From Profile Values . . . and choose from the pull down menu.

   b. Click the recalculate/validate values… link

   c. Save



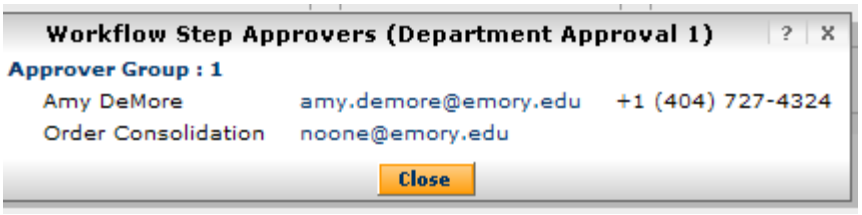



# Place an Order

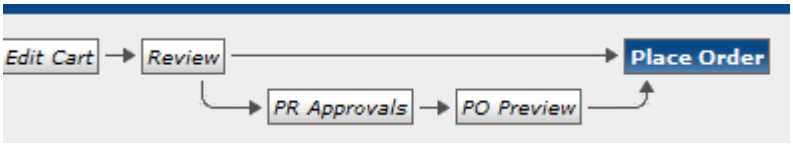
After reviewing the cart and making any adjustments, you may review your approvers and place your order.

1. Click **PR Approvals** in the flowchart
2. Click **view approvers**

3. A list of approvers for the step will display




4. To place your order, click **Place Order** in the flowchart




5. A Requisition Information box will appear with the Req number, cart name, total, etc.

Requisition Information
Requisition number 3389476 has been submitted from the shopping cart 2007-01-14 office 01
Requisition number 3389476 view
Cart name 2007-01-14 office 01
Requisition date 1/15/2007
Requisition total 88.70 USD
Number of line items 2

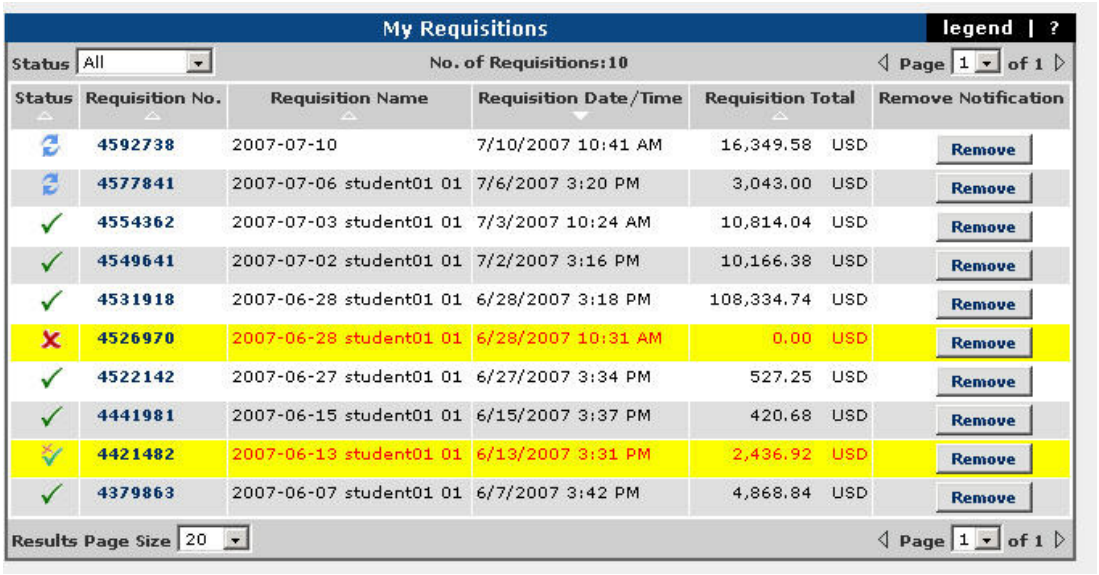
# Checking Status

You can check the status of your requisition from the History, My Requisitions tabs in the menu bar.

Emory Express provides a listing of requisitions in date sequence.

You may review any pending requisitions by selecting the requisition number and clicking on the PR Approvals Tab.

You may review the reason for rejected requisition by selecting the requisition number and clicking on the History Tab.



My Requisitions — legend | ?

Status: All — No. of Requisitions:10 — Page 1 of 1

| Status | Requisition No. | Requisition Name | Requisition Date/Time | Requisition Total | Remove Notification |
|---|---|---|---|---|---|
| | 4592738 | 2007-07-10 | 7/10/2007 10:41 AM | 16,349.58 USD | Remove |
| | 4577841 | 2007-07-06 student01 01 | 7/6/2007 3:20 PM | 3,043.00 USD | Remove |
| | 4554362 | 2007-07-03 student01 01 | 7/3/2007 10:24 AM | 10,814.04 USD | Remove |
| | 4549641 | 2007-07-02 student01 01 | 7/2/2007 3:16 PM | 10,166.38 USD | Remove |
| | 4531918 | 2007-06-28 student01 01 | 6/28/2007 3:18 PM | 108,334.74 USD | Remove |
| | 4526970 | 2007-06-28 student01 01 | 6/28/2007 10:31 AM | 0.00 USD | Remove |
| | 4522142 | 2007-06-27 student01 01 | 6/27/2007 3:34 PM | 527.25 USD | Remove |
| | 4441981 | 2007-06-15 student01 01 | 6/15/2007 3:37 PM | 420.68 USD | Remove |
| | 4421482 | 2007-06-13 student01 01 | 6/13/2007 3:31 PM | 2,436.92 USD | Remove |
| | 4379863 | 2007-06-07 student01 01 | 6/7/2007 3:42 PM | 4,868.84 USD | Remove |

Results Page Size: 20 — Page 1 of 1

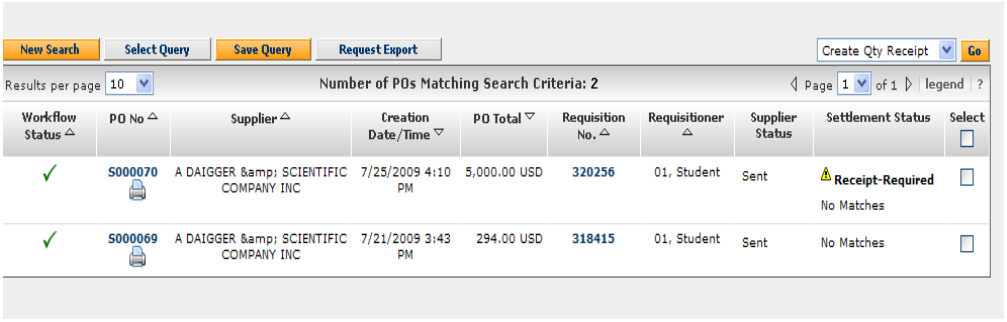
| LEGEND | |
|---|---|
| | Requisition Approved |
| | Requisition Pending Approval |
| | Requisition Rejected |
| | Requisition Withdrawn |
| | Pending, but line item(s) Rejected |
| | Approved, but line item(s) Rejected |

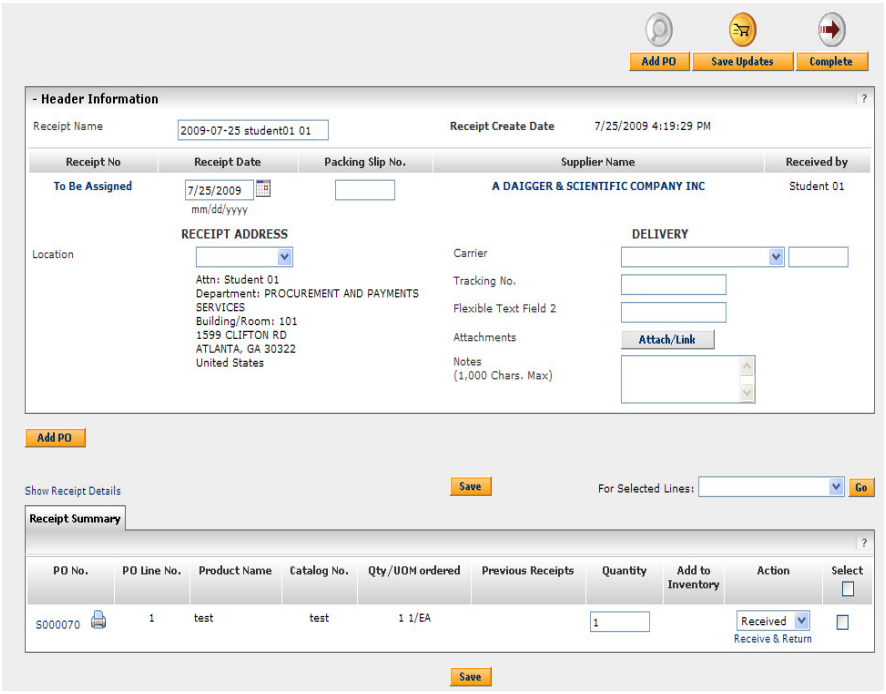
# Receive/Complete an Order

All purchase orders over $1499 must be received in Emory Express

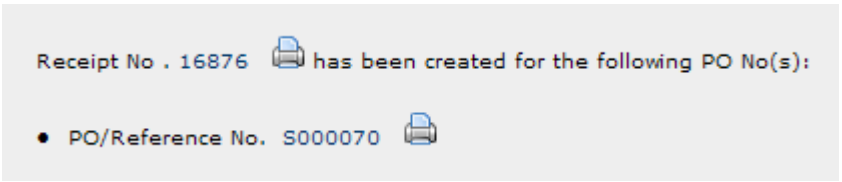
1. **History**
2. **My Purchase Orders**
3. Check the **Selection Box** to the right of the Purchase Order you need to acknowledge receiving
4. In 'Available actions' choose **Create Quantity Receipt**
5. Click

6. Enter the quantity received for each item.
7. **Save updates.**
8. **Complete.**




9. A receipt confirmation will appear. Click on the printer icon to open a printer friendly window.



# Appendix

A. Ordering Radioactive Materials

B. Ordering from Specialty Gases Southeast, Inc.

C. Acquisition and Payment of Goods/Services (P-card purchases, Business Travel, and Online Payment Requests)

# Appendix A
# Ordering Radioactive Items

**Below are the 5 <u>requirements</u> when ordering radioactive items:**

1. **<u>All</u> radioactive materials** must be shipped to our central receiving location, the Radiation Safety Office.

   This address should be saved in the user's profile and must be used as the shipping address for radiopharmaceuticals.

   **Radiation Safety Office**
   **Attn: Radiation Safety/<PI's Full Name>**
   **Department: EHSO, Room G44**
   **Building/Room: Whitehead Building**
   **615 Michael Street**
   **Atlanta GA 30322**

2. Radioactive materials must be charged to **account 54580**.
   The account 54580 should be saved in the in the user's profile and must be used as the subcode for radioactive requisitions.

3. The **PI's authorization number,** usually R - ###, the **amount of radioactive material on hand**, and the **lab location for RSO delivery** must be included in the **internal notes** of the requisition or form.

4. Any radiopharmaceutical that is not available from the hosted catalogs in Express must be requested on a **Request for Radioactive Material** form. See 'Forms'

5. Radioactive items must be requested in a separate cart.

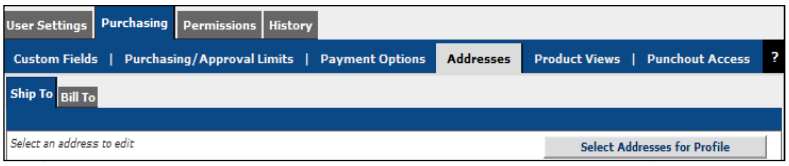
# Ordering Radioactive Items

## Add Radiation Safety to 'Ship to' Addresses

All radiopharmaceuticals must be shipped to the Radiation Safety Office. The address should be added to the user's profile and selected when needed.

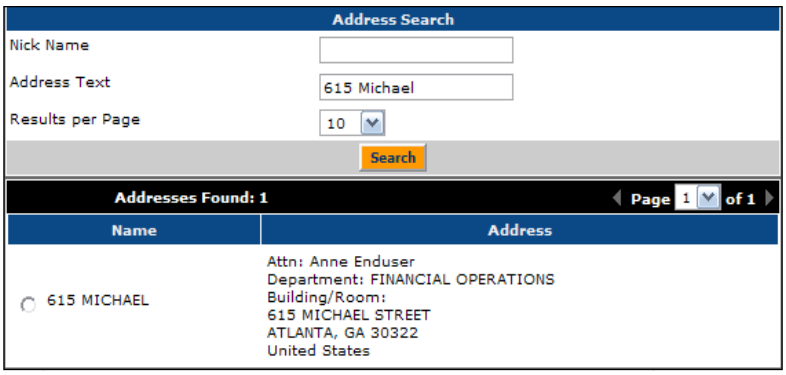
1. Click **Profile**

2. Click **Purchasing**
3. Click **Addresses**
4. Click **Ship To**
5. Click **Select Addresses for Profile**




6. Enter "**615**" and Search

7. Click on the circle to the left of the address, **615 MICHAEL**




8. Enter this information

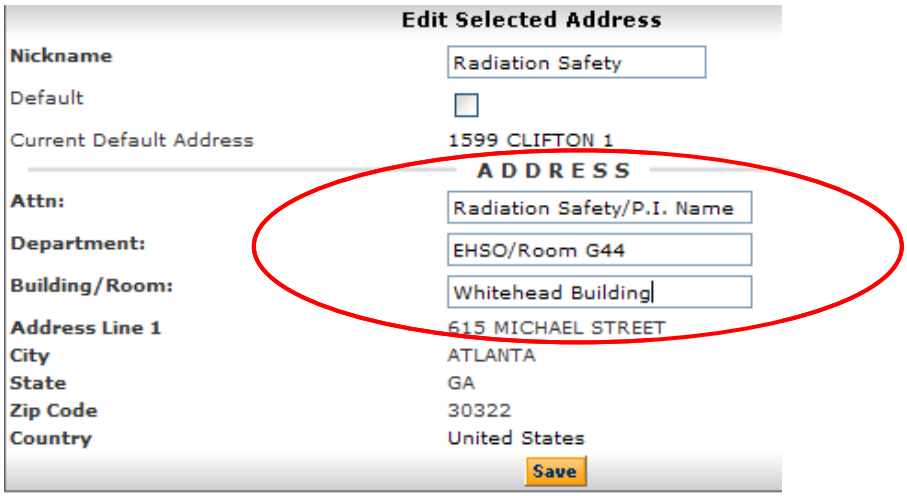
**Nickname**: Radiation Safety

**Attn, Department, and Building/Room -** *Must be entered in the format shown*

Attn: **Radiation Safety/PI's Name**

Dept: **EHSO/ Room G44**

Bldg/Room: **Whitehead Building**



# Ordering Radioactives

Radioactive materials can be ordered from hosted catalogs in Express.

However, to request a radiopharmaceutical that is not available from a hosted catalog in Express, use the **Request for Radioactive Material form**.

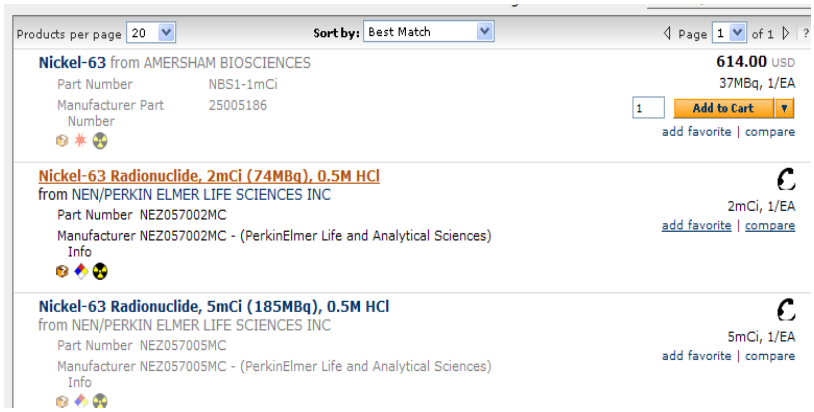
## Request a radioactive item from a hosted catalog supplier

1. Search for the item or choose it from Favorites.

☢ indicates a radioactive item

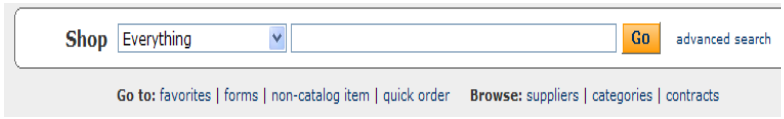
◆ indicates a hazardous item

2. **Add to Cart**

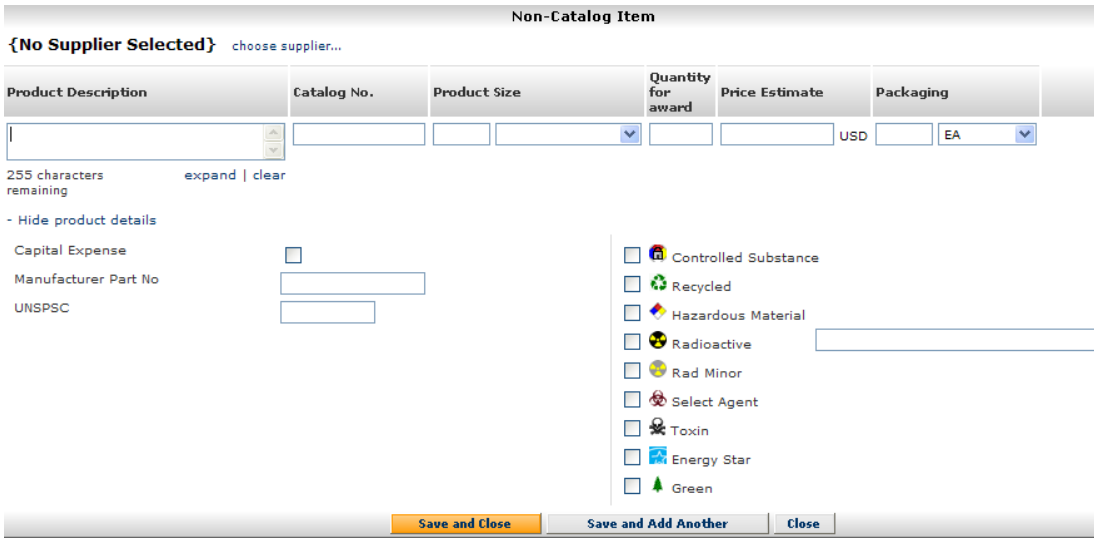



## Request a radioactive item that is not in a catalog

1. Click the **non-catalog item** link




2. Complete the non-catalog item as instructed on pp 24-26 **and** select the ☢ Radioactive box



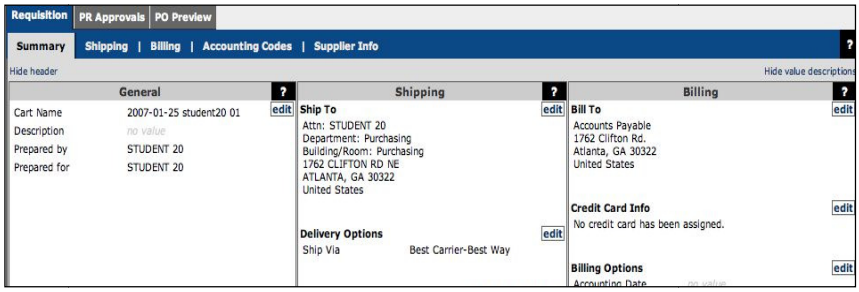
# Review cart

Review the cart and enter the shipping address, 54580 subcode, and internal notes.

**Shipping, subcode, and internal notes**

**1**. Review the cart.

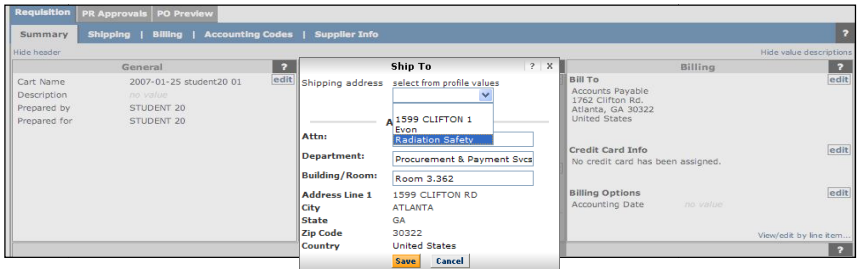
**2**. Choose **Requisition** tab**,** then **Summary**.



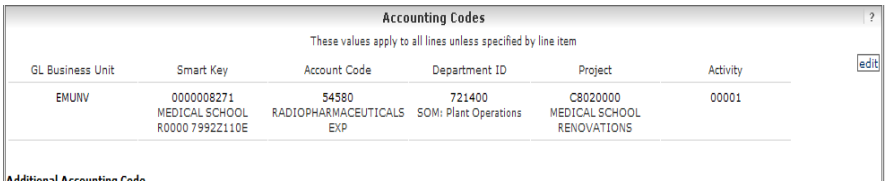

**3.** **edit** the shipping details and

**4.** From the profile select the **Radiation Safety address** or use the org address search to find 615 Michael Street.

Save

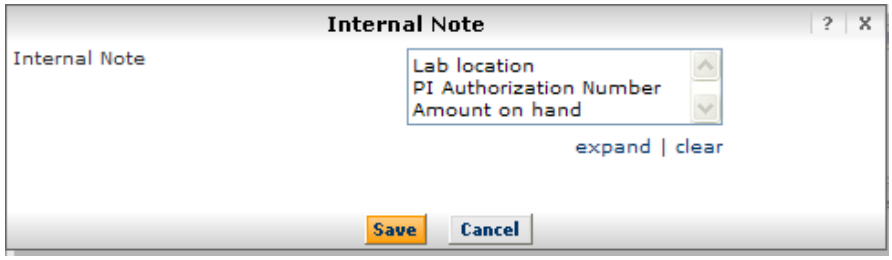



**5**. **edit** the Accounting Codes and enter the Smart Key and **account 54580**. Save




**6**. **edit** the Internal Notes. Enter the **PI's authorization # (R-###)** and the **amount of radioactive material on hand.**

Save



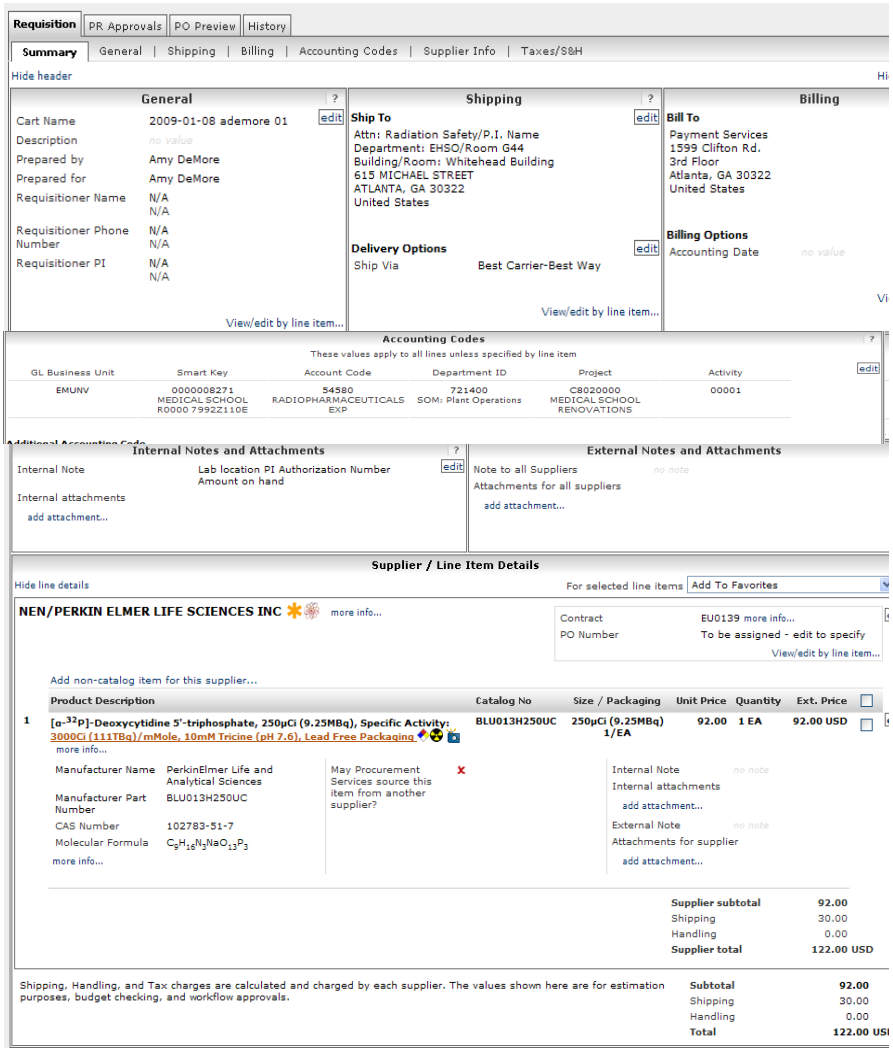
# Confirm and Place Order

6. Confirm info including

Shipping to **Radiation Safety, Room G 44, 615 Michael**

Account **54580**

Internal notes has **the PI authorization number,** the Amount of **radiation on hand**, and **lab location.**


Requisition
PR Approvals
PO Preview
History
Summary
General | Shipping | Billing | Accounting Codes | Supplier Info | Taxes/S&H
Hide header
General
Cart Name 2009-01-08 ademore 01
Description
Prepared by Amy DeMore
Prepared for Amy DeMore
Requisitioner Name N/A N/A
Requisitioner Phone Number N/A N/A
Requisitioner PI N/A N/A
View/edit by line item...
Shipping
Ship To
Attn: Radiation Safety/P.I. Name
Department: EHSO/Room G44
Building/Room: Whitehead Building
615 MICHAEL STREET
ATLANTA, GA 30322
United States
Delivery Options
Ship Via Best Carrier-Best Way
View/edit by line item...
Billing
Bill To
Payment Services
1599 Clifton Rd.
3rd Floor
Atlanta, GA 30322
United States
Billing Options
Accounting Date
Accounting Codes
These values apply to all lines unless specified by line item
GL Business Unit | Smart Key | Account Code | Department ID | Project | Activity
EMUNV | 0000008271 MEDICAL SCHOOL R0000 7992Z110E | 54580 RADIOPHARMACEUTICALS EXP | 721400 SOM: Plant Operations | C8020000 MEDICAL SCHOOL RENOVATIONS | 00001
Internal Notes and Attachments
Internal Note
Lab location PI Authorization Number
Amount on hand
Internal attachments
add attachment...
External Notes and Attachments
Note to all Suppliers
Attachments for all suppliers
add attachment...
Supplier / Line Item Details
Hide line details
For selected line items Add To Favorites
NEN/PERKIN ELMER LIFE SCIENCES INC more info...
Contract EU0139 more info...
PO Number To be assigned - edit to specify
View/edit by line item...
Add non-catalog item for this supplier...
Product Description | Catalog No | Size / Packaging | Unit Price | Quantity | Ext. Price
1 [α-32P]-Deoxycytidine 5'-triphosphate, 250µCi (9.25MBq), Specific Activity: 3000Ci (111TBq)/mMole, 10mM Tricine (pH 7.6), Lead Free Packaging | BLU013H250UC | 250µCi (9.25MBq) 1/EA | 92.00 | 1 EA | 92.00 USD
more info...
Manufacturer Name PerkinElmer Life and Analytical Sciences
Manufacturer Part Number BLU013H250UC
CAS Number 102783-51-7
Molecular Formula C9H16N3NaO13P3
more info...
May Procurement Services source this item from another supplier?
Internal Note
Internal attachments
add attachment...
External Note
Attachments for supplier
add attachment...
Supplier subtotal 92.00
Shipping 30.00
Handling 0.00
Supplier total 122.00 USD
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.
Subtotal 92.00
Shipping 30.00
Handling 0.00
Total 122.00 USD

**8.** Place the order.

The requisition will be electronically placed into the approval workflow.

# Appendix B
# Ordering from Nexair

Nexair requires:

- the user's account number - E#### that is assigned by Nexair
- the Smart Key that the tank rental fee should be charged to.

Enter the information in the external notes field for Nexair.